Matrix Conversion Manual

/crmls @crmlsnews

Support: 909-859-2040 / 800-925-1525
Mon–Fri 8:30 AM – 9:00 PM · Sat & Sun 10:00 AM – 3:00 PM

www.crmls.org

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WELCOME

Welcome to the CRMLS Matrix platform. Matrix is the industry's top rated MLS platform offering an ultra-modern and flexible environment. This manual will help you verify that all your information was migrated from your original MLS, give you a basic introduction to the Matrix platform, and guide you through performing basic searches, viewing search results, printing, emailing, and managing listings. Follow the steps in these sections to get started.

MINIMUM SYSTEM REQUIREMENTS

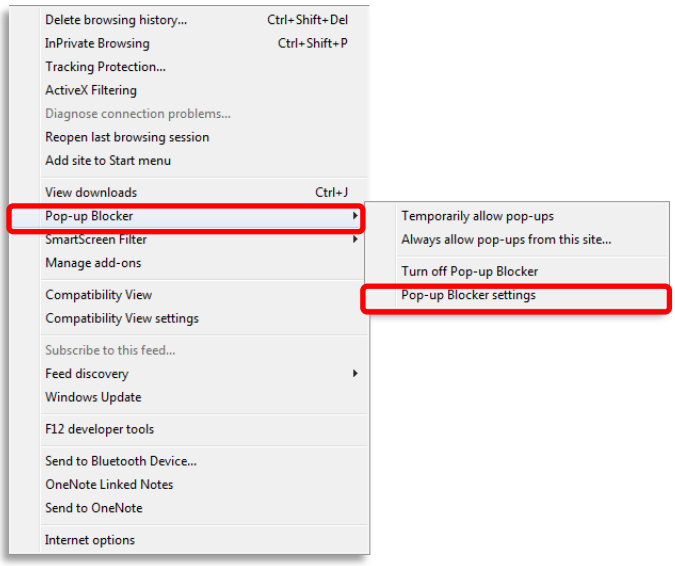
To use the CRMLS Matrix platform, your system should meet these minimum requirements:

Operating System:	Windows XP, Windows Vista, Windows 7, or Mac OS X
Internet Connection:	56k Modem (DSL, Cable Modem, or other high speed internet access recommended)
Web Browser:	Internet Explorer 7.0 or later, Firefox, Safari, or Chrome

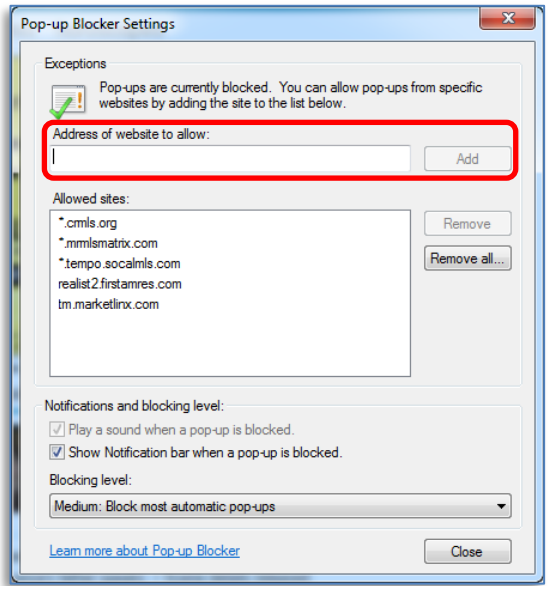
DISABLING POP-UP BLOCKERS

Your computer may have an Internet browser or security software that blocks Internet pop-ups. CRMLS products utilize help screens and other features that may be blocked by some pop-up blockers. Follow the steps below to allow pop-ups from CRMLS products in Internet Explorer.

1. In Internet Explorer, select **Tools → Pop-up Blocker → Pop-up Blocker Settings**



2. Add the following websites to the "Allowed Sites" list:
   - http://crmls.org (CRMLS Website)
   - http://www.mrmlsmatrix.com (CRMLS Matrix)
   - http://realist2.firstamres.com (Realist Tax)
   - http://tm.marketlinx.com (Smart Fax)



Note:

For information on allowing pop-ups from CRMLS products in other Internet browsers or security software, refer to your application's documentation.

ACCESSING THE CRMLS MATRIX PLATFORM

Follow the steps below to access the CRMLS Matrix platform from our website.

1. Open your web browser and navigate to http://www.crmls.org
2. Click **CRMLS Matrix** button.

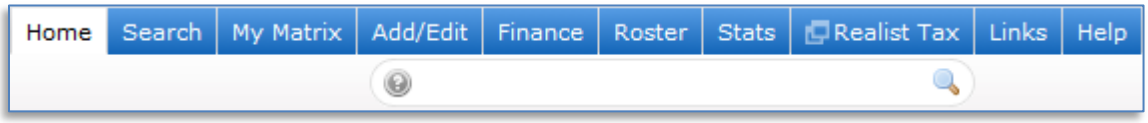
3. Enter your SCOUT Login information and click **Login**.

   ***Note**: Your User ID, Password, and Secret questions remain the same as in Tempo.*

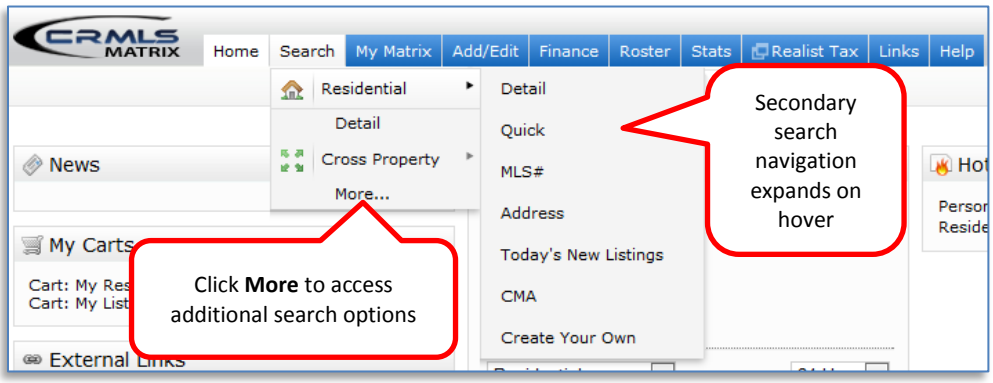
4. After successful login in, you will see the CRMLS Matrix home screen which we will discuss in the next section.

CRMLS MATRIX PLATFORM NAVIGATION OVERVIEW

The CRMLS Matrix platform's navigation menu bar is geared towards reducing the number of clicks required for navigation throughout Matrix.



When you hover over certain tabs, you will see a drop down menu with additional navigation options.

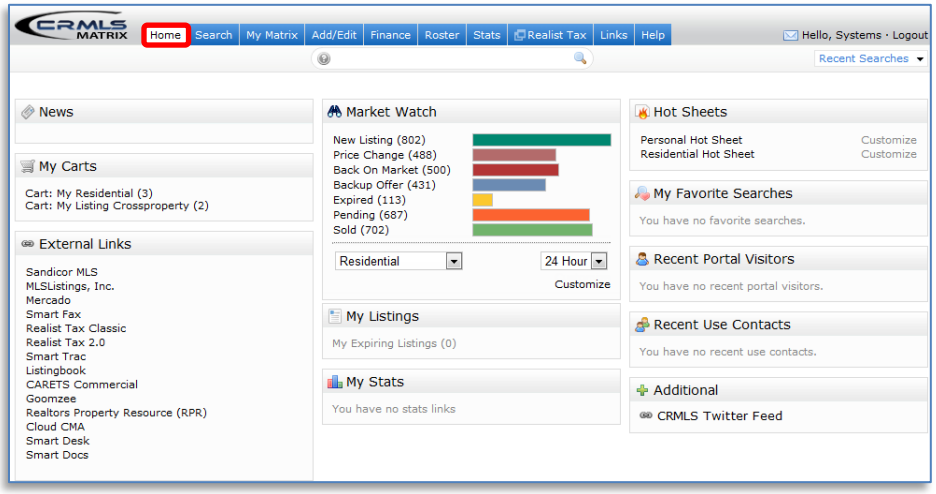


THE 10 TABS OF MATRIX:

1. **Home Tab** includes Matrix news, Market Watch, Hot Sheets, Favorite Searches, and various other widgets that allow you to access different features.
2. **Search Tab** allows you to access and search for listings in Residential, Residential Income, Residential Lease, Land/Lot, Mobile, Cross Property, Open House, and Property History.
3. **My Matrix Tab** contains your Contacts, Auto Emails, Saved Searches, Sent Emails, CMA's, Watched Listings, My Listings, and Settings.
4. **Add/Edit Tab** includes the ability to Add/Modify Listings, Open Houses, and the option to change your personal contact information.
5. **Finance Tab** offers the ability to calculate net sheets and utilize other personal financial calculators.
6. **Roster Tab** allows you to search for other agents and offices in the Matrix system.
7. **Stats Tab** allows you to pull statistical reports based on MLS data for various property types.
8. **Realist Tax Tab** allows you to search property tax record information and compile farm packages.
9. **Links Tab** contains links to additional products and services that you can access.
10. **Help Tab** contains the data integrity standards, photo policy, FAQ, reciprocal passwords, links to training classes, manuals, quick reference guides, video tutorials, and other helpful tools.

HOME TAB

The **Home** tab gives you quick access to everyday tasks and is the first tab you see when you log into Matrix.

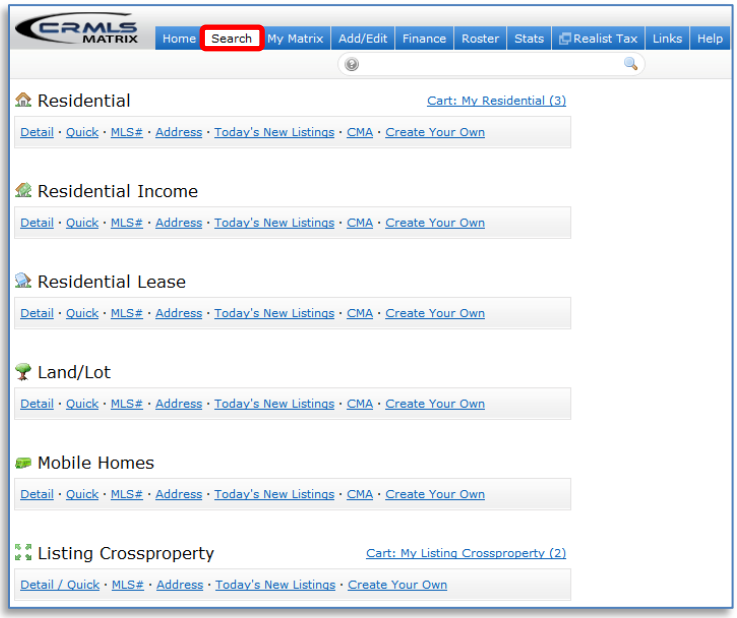


The Home tab gives you quick access to the following items:

- The **News** widget displays current updates, releases, and important information.
- The **Market Watch** widget displays changes in the market place by property type.
- The **Hot Sheets** widget is customizable and displays the latest market changes.
- The **My Carts** widget gives you access to listings you have added to each property cart.
- The **My Favorite Searches** widget displays up to 12 of your saved searches.
- The **External Links** widget gives you access to additional CRMLS products and MLS systems such as; Sandicor MLS, MLSListings, Inc., Realist Tax, Listingbook, Cloud CMA, and others.
- The **My Listings** widget displays your current listings and any listings that will be expiring within two weeks.
- The **My Stats** widget allows you to access your customized statistical reports.
- The **Recent Portal Visitors** widget displays a list of clients that have viewed listings sent to them on your behalf via the Auto Email feature in the Matrix.
- The **Recent Use Contacts** widget displays a list of your most recently clients in the Matrix.
- The **Additional** widget will store all the widgets not in use on your Home tab.

SEARCH TAB

The **Search** tab allows you to search for listings by property type, including Residential, Residential Income, Residential Lease, Land/Lot, Mobile Homes, and Listing Cross Property. You can also search for Open Houses, Caravans, Property History, and Change Type History.

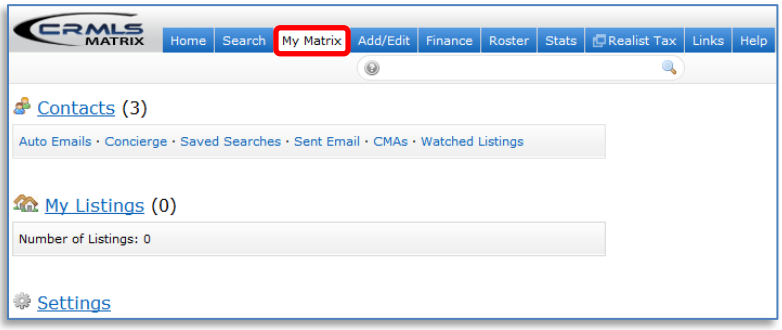

CRMLS MATRIX
Home
Search
My Matrix
Add/Edit
Finance
Roster
Stats
Realist Tax
Links
Help
Residential
Cart: My Residential (3)
Detail · Quick · MLS# · Address · Today's New Listings · CMA · Create Your Own
Residential Income
Detail · Quick · MLS# · Address · Today's New Listings · CMA · Create Your Own
Residential Lease
Detail · Quick · MLS# · Address · Today's New Listings · CMA · Create Your Own
Land/Lot
Detail · Quick · MLS# · Address · Today's New Listings · CMA · Create Your Own
Mobile Homes
Detail · Quick · MLS# · Address · Today's New Listings · CMA · Create Your Own
Listing Crossproperty
Cart: My Listing Crossproperty (2)
Detail / Quick · MLS# · Address · Today's New Listings · Create Your Own

Note:

*To search for Commercial/Industrial properties, Commercial Leases, or Business Opportunities, use the CARETS Commercial system instead. You can access CARETS Commercial from the **Links** tab in Matrix.*

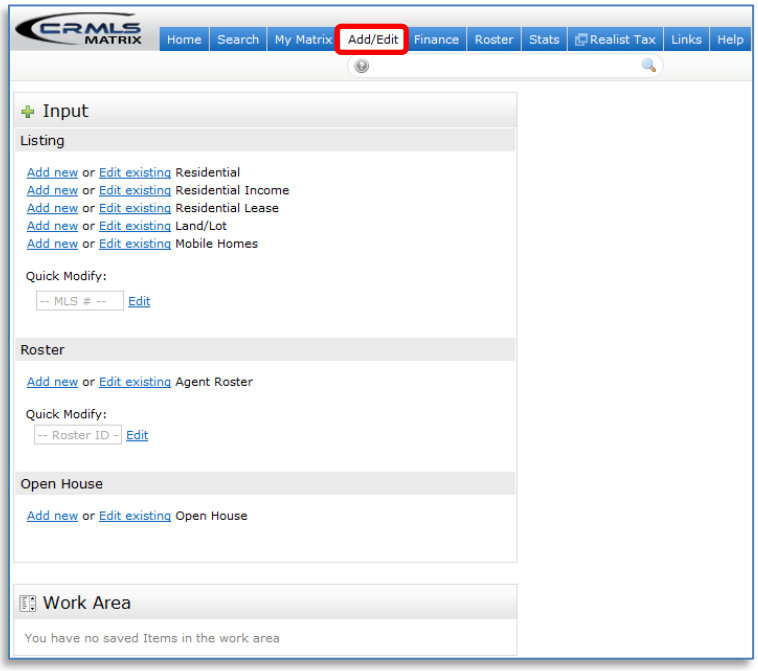
MY MATRIX TAB

The **My Matrix** tab allows you to manage your Contacts, Auto Emails, Concierge, Saved Searches, access Sent Email's, Create or Update CMA's, and View your Watched Listings. In addition, you can manage your listings and update your account settings.



ADD/EDIT TAB

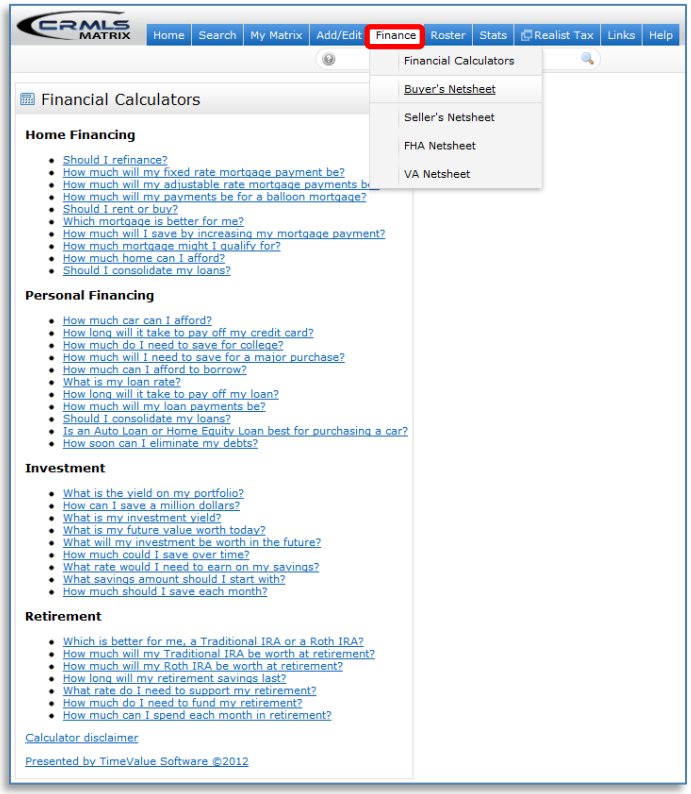
The **Add/Edit** tab allows you to add listings, modify listings and open house entries, and retrieve partially saved listings. You can also edit your contact (roster) information (see the "Updating Your Contact Information" section for more details).



Note: *Partially saved listings are saved in the Work Area and are available until you remove them.*

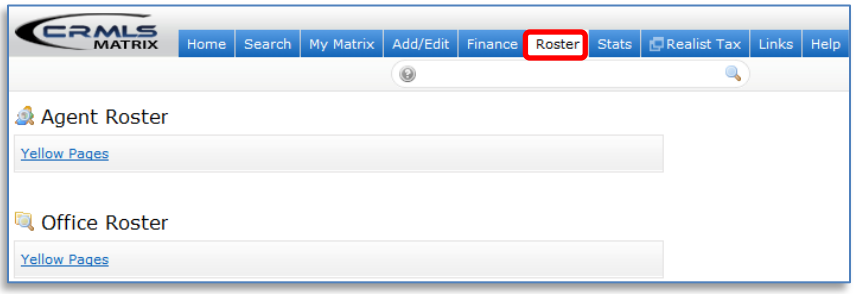
FINANCE TAB

The **Finance** tab contains various home financing, personal financing, investment, and retirement calculators. In addition, the tab provides access to Buyers, Sellers, FHA, and VA net sheets.


Home
Search
My Matrix
Add/Edit
Finance
Roster
Stats
Realist Tax
Links
Help
Financial Calculators
Buyer's Netsheet
Seller's Netsheet
FHA Netsheet
VA Netsheet
Financial Calculators
Home Financing
Should I refinance?
How much will my fixed rate mortgage payment be?
How much will my adjustable rate mortgage payments be
How much will my payments be for a balloon mortgage?
Should I rent or buy?
Which mortgage is better for me?
How much will I save by increasing my mortgage payment?
How much mortgage might I qualify for?
How much home can I afford?
Should I consolidate my loans?
Personal Financing
How much car can I afford?
How long will it take to pay off my credit card?
How much do I need to save for college?
How much will I need to save for a major purchase?
How much can I afford to borrow?
What is my loan rate?
How long will it take to pay off my loan?
How much will my loan payments be?
Should I consolidate my loans?
Is an Auto Loan or Home Equity Loan best for purchasing a car?
How soon can I eliminate my debts?
Investment
What is the yield on my portfolio?
How can I save a million dollars?
What is my investment yield?
What is my future value worth today?
What will my investment be worth in the future?
How much could I save over time?
What rate would I need to earn on my savings?
What savings amount should I start with?
How much should I save each month?
Retirement
Which is better for me, a Traditional IRA or a Roth IRA?
How much will my Traditional IRA be worth at retirement?
How much will my Roth IRA be worth at retirement?
How long will my retirement savings last?
What rate do I need to support my retirement?
How much do I need to fund my retirement?
How much can I spend each month in retirement?
Calculator disclaimer
Presented by TimeValue Software ©2012

ROSTER TAB

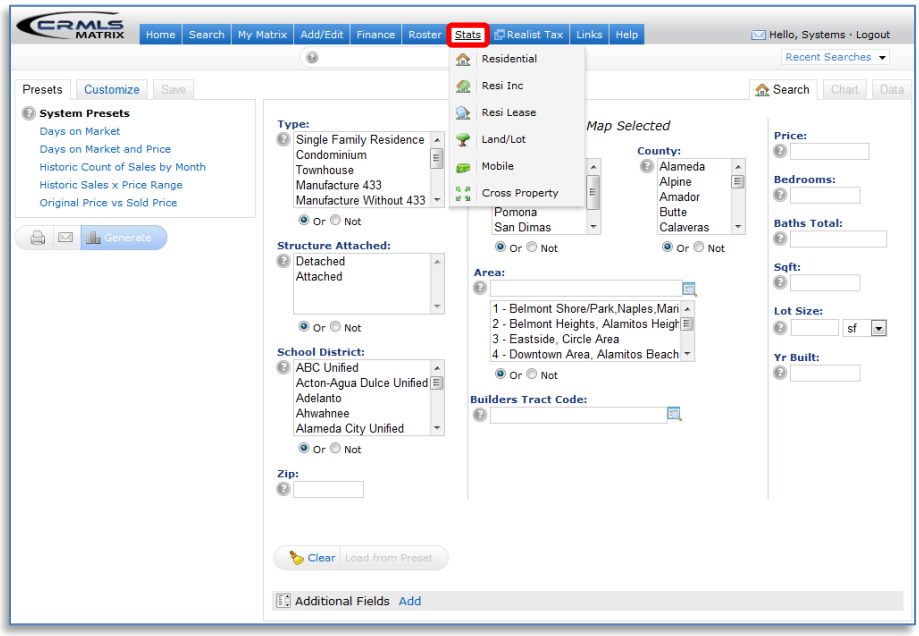
The **Roster** tab allows you to search for agents and offices in Matrix.



STATISTICS TAB

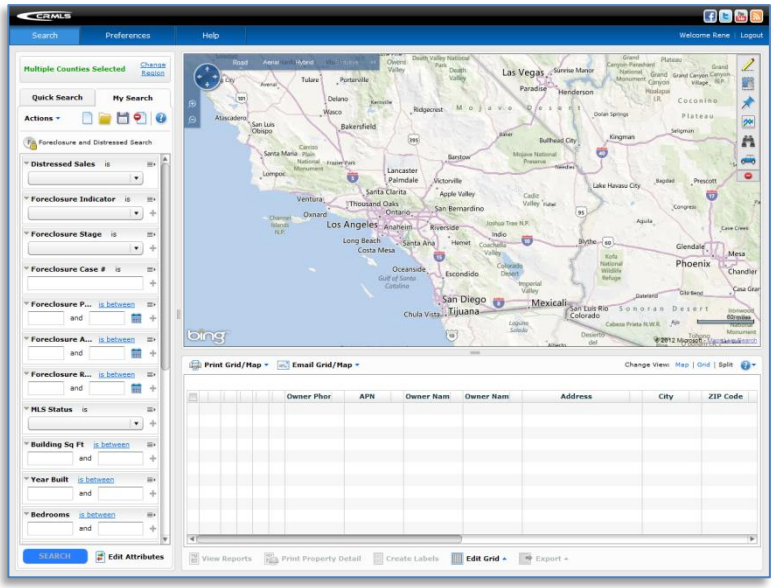
The **Stats** (Statistics) tab allows you to analyze market trends and activity based on property type such as Residential, Residential Income, Residential Lease, Land/Lot, Mobile Homes, and Cross property.

You can create statistical charts and graphs, and export statistical data. System presets allow you to quickly generate standard charts and graphs, or customize them with your own parameters to create a higher level view of the market.



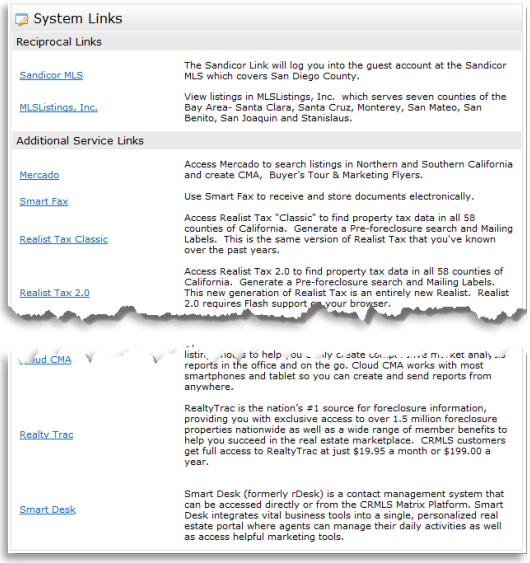
REALIST TAX TAB

The **Realist Tax** tab allows you to access an integrated tax database that combines public records such as notice of defaults and trustee sales, CRMLS listing data, maps, and market data in a single research tool. Realist Tax covers all counties in California and is updated frequently.



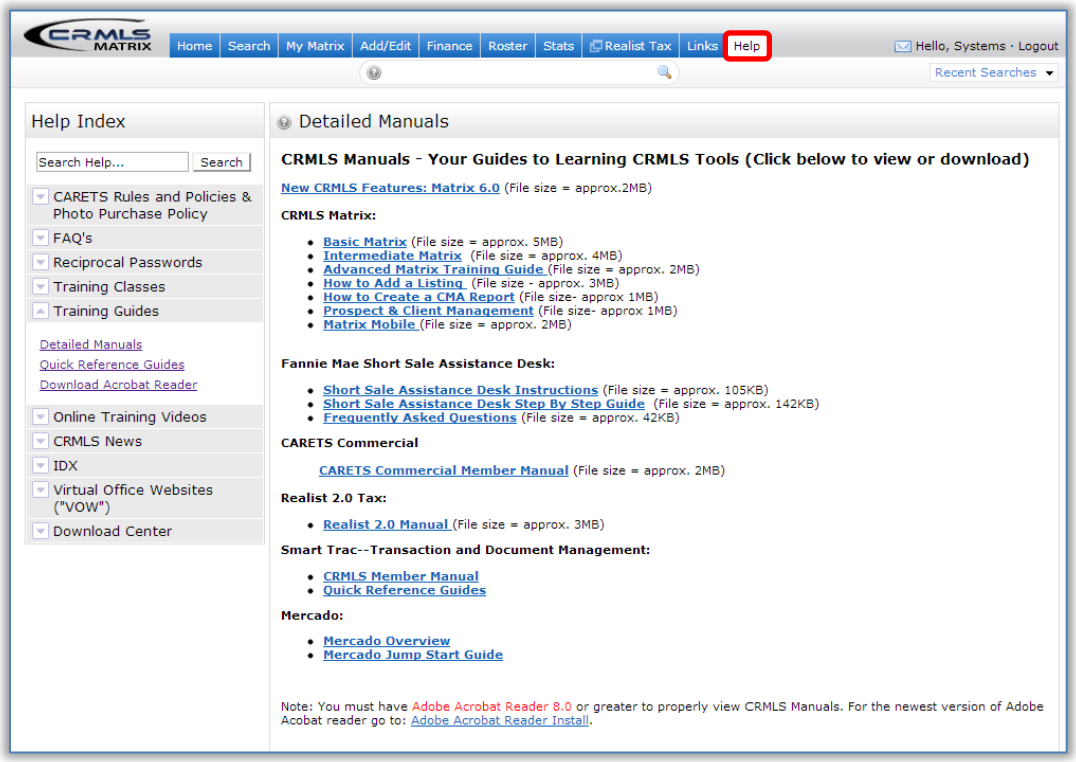
LINKS TAB

The **Links** tab allows you to access additional California Regional MLS products and services. For more information on the products and services you receive as part of your membership, please contact your Local Association/Board of Realtors®.


System Links
Reciprocal Links
Sandicor MLS
The Sandicor Link will log you into the guest account at the Sandicor MLS which covers San Diego County.
MLSListings, Inc.
View listings in MLSListings, Inc. which serves seven counties of the Bay Area- Santa Clara, Santa Cruz, Monterey, San Mateo, San Benito, San Joaquin and Stanislaus.
Additional Service Links
Mercado
Access Mercado to search listings in Northern and Southern California and create CMA, Buyer's Tour & Marketing Flyers.
Smart Fax
Use Smart Fax to receive and store documents electronically.
Realist Tax Classic
Access Realist Tax "Classic" to find property tax data in all 58 counties of California. Generate a Pre-foreclosure search and Mailing Labels. This is the same version of Realist Tax that you've known over the past years.
Realist Tax 2.0
Access Realist Tax 2.0 to find property tax data in all 58 counties of California. Generate a Pre-foreclosure search and Mailing Labels. This new generation of Realist Tax is an entirely new Realist. Realist 2.0 requires Flash support on your browser.
Realty Trac
RealtyTrac is the nation's #1 source for foreclosure information, providing you with exclusive access to over 1.5 million foreclosure properties nationwide as well as a wide range of member benefits to help you succeed in the real estate marketplace. CRMLS customers get full access to RealtyTrac at just $19.95 a month or $199.00 a year.
Smart Desk
Smart Desk (formerly rDesk) is a contact management system that can be accessed directly or from the CRMLS Matrix Platform. Smart Desk integrates vital business tools into a single, personalized real estate portal where agents can manage their daily activities as well as access helpful marketing tools.

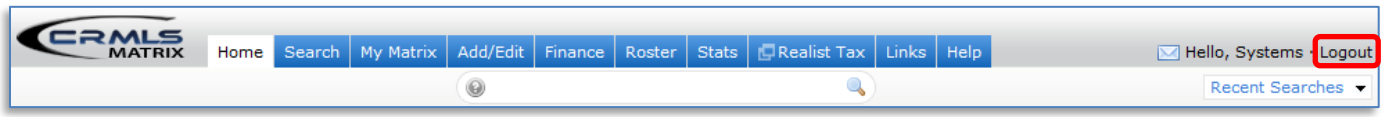
HELP TAB

The **Help** tab contains searchable links to helpful information such as reciprocal links and passwords, CARETS rules and policies, frequently asked questions, reciprocal passwords, training class schedules, training guides, online training videos, CRMLS news, IDX solutions and policy, virtual office websites (VOW) rules and policy, and the download center.


Home
Search
My Matrix
Add/Edit
Finance
Roster
Stats
Realist Tax
Links
Help
Hello, Systems · Logout
Recent Searches
Help Index
Search Help...
Search
CARETS Rules and Policies & Photo Purchase Policy
FAQ's
Reciprocal Passwords
Training Classes
Training Guides
Detailed Manuals
Quick Reference Guides
Download Acrobat Reader
Online Training Videos
CRMLS News
IDX
Virtual Office Websites ("VOW")
Download Center
Detailed Manuals
CRMLS Manuals - Your Guides to Learning CRMLS Tools (Click below to view or download)
New CRMLS Features: Matrix 6.0 (File size = approx.2MB)
CRMLS Matrix:
Basic Matrix (File size = approx. 5MB)
Intermediate Matrix (File size = approx. 4MB)
Advanced Matrix Training Guide (File size = approx. 2MB)
How to Add a Listing (File size - approx. 3MB)
How to Create a CMA Report (File size- approx 1MB)
Prospect & Client Management (File size- approx 1MB)
Matrix Mobile (File size = approx. 2MB)
Fannie Mae Short Sale Assistance Desk:
Short Sale Assistance Desk Instructions (File size = approx. 105KB)
Short Sale Assistance Desk Step By Step Guide (File size = approx. 142KB)
Frequently Asked Questions (File size = approx. 42KB)
CARETS Commercial
CARETS Commercial Member Manual (File size = approx. 2MB)
Realist 2.0 Tax:
Realist 2.0 Manual (File size = approx. 3MB)
Smart Trac--Transaction and Document Management:
CRMLS Member Manual
Quick Reference Guides
Mercado:
Mercado Overview
Mercado Jump Start Guide
Note: You must have Adobe Acrobat Reader 8.0 or greater to properly view CRMLS Manuals. For the newest version of Adobe Acobat reader go to: Adobe Acrobat Reader Install.

LOGOUT LINK

When you are finished working in Matrix, click the **Logout** link to sign out, then close your web browser.



POST CONVERSION TASKS

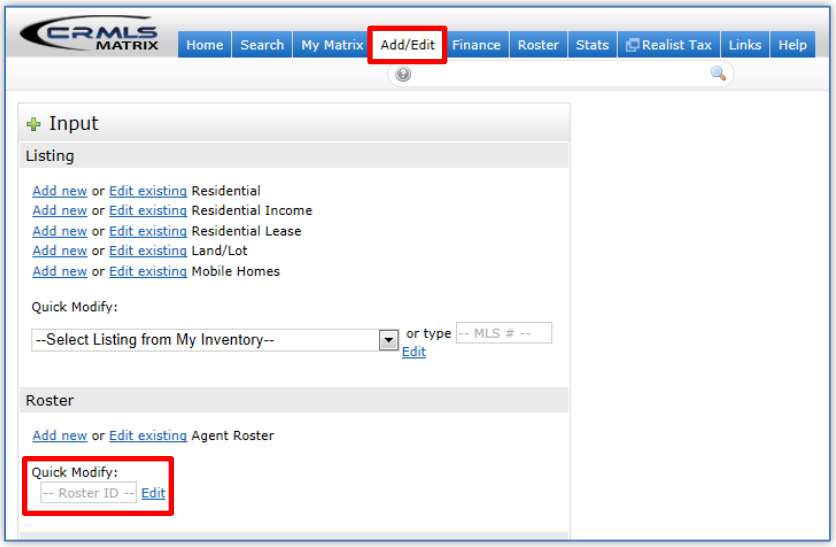
Follow the steps in these sections to verify your contact information, listings, contacts, and to ensure that your saved searches were migrated to Matrix. Once you've verified that your information was transferred over, you can re-enable your Prospects and Client Gateways.

VERIFY YOUR CONTACT INFORMATION

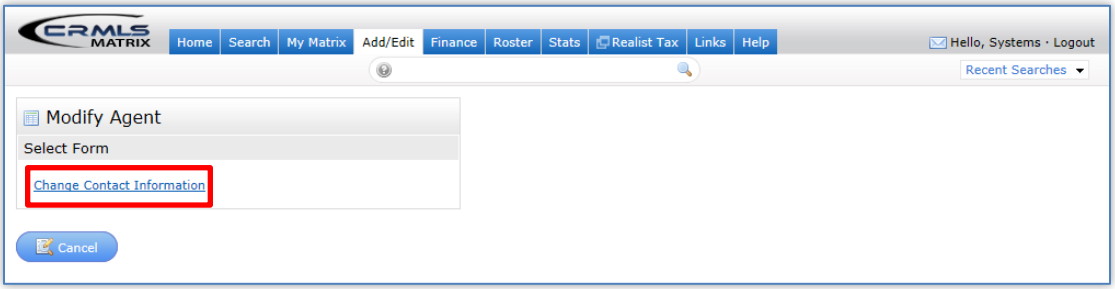
Your contact information is one of the most valuable pieces of information you can provide to CRMLS members. The Matrix platform also displays your contact information on agent and client reports and displays. Follow the steps below to update your contact information and preferred contact order.

1. Click the **Add/Edit** tab.

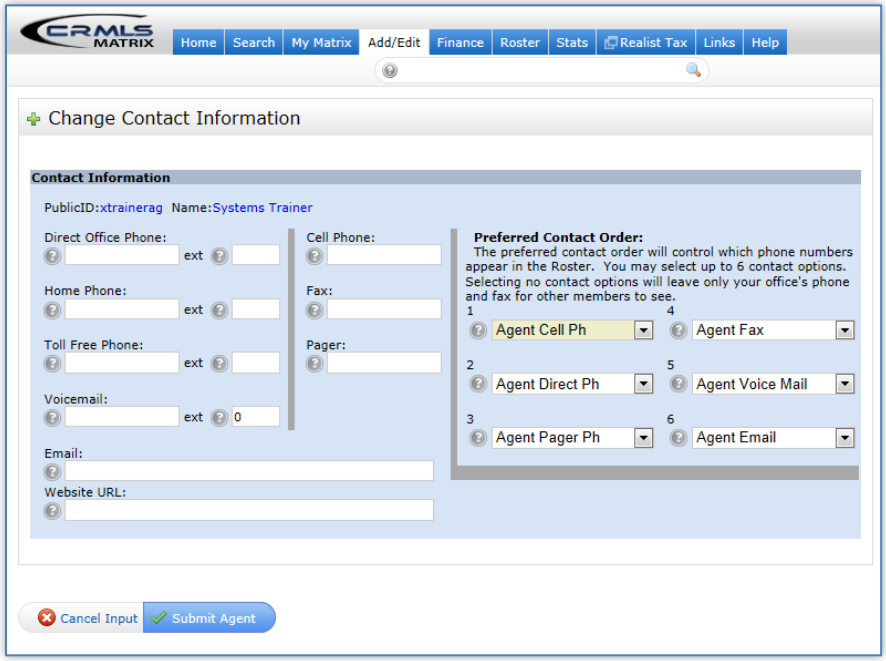
2. Under Roster, type your User ID into the **Quick Modify** field, then click Edit.



3. Click **Change Contact Information**.



4. Update your contact information and preferred contact order using the available fields.



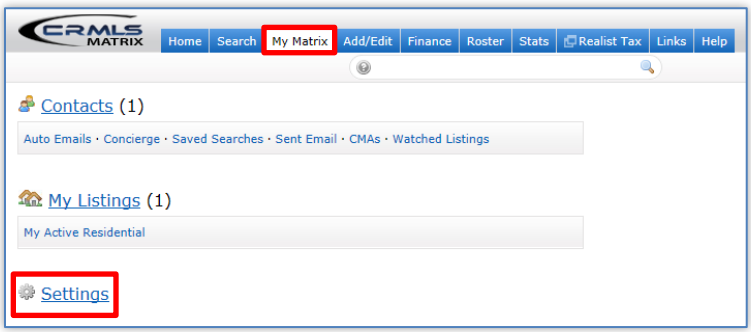
5. Verify that your Email address is up to date and monitored regularly. The Email address on files is used by the Matrix platform to send you notifications and not having a valid email address on file can lead to missed communications and/or loss of features.

6. When you're done, click **Submit Agent** to save your updated contact information.

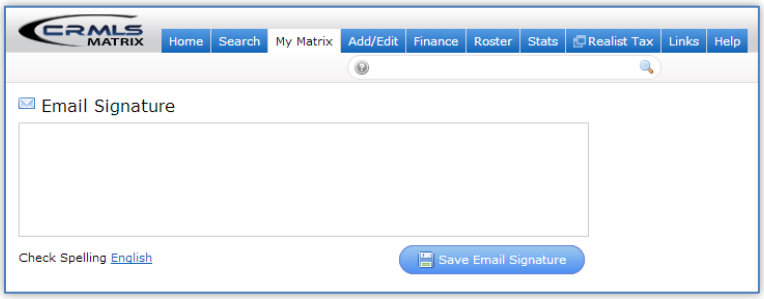
CREATE AN EMAIL SIGNATURE

When you send an email from the Matrix platform, your email signature will appear at the bottom of the email. Follow the steps below to create an email signature in Matrix.

1. Click **Settings** on the **My Matrix** tab.



2. Enter your Email signature.



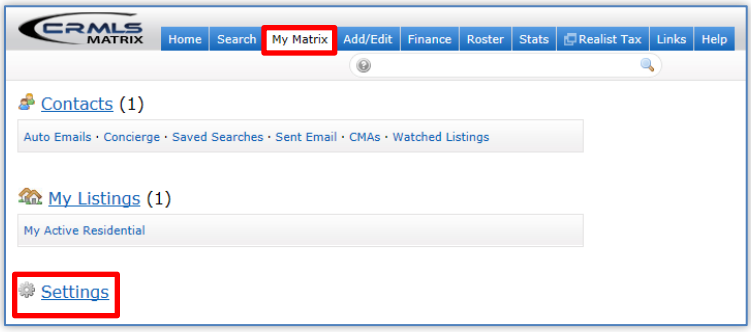
3. Click the **English** Check Spelling link to spell check your email signature.

4. Click **Save Email Signature** when you are done entering your email signature.

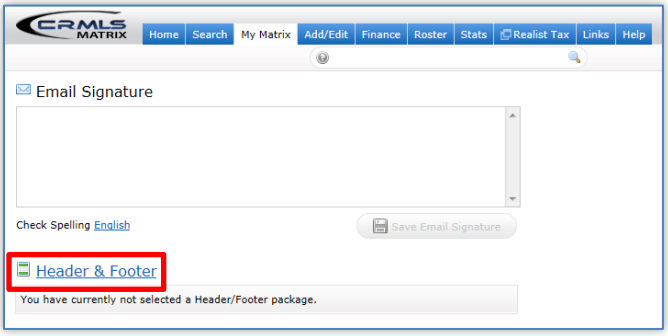
CREATE HEADERS AND FOOTERS

The Matrix platform allows you to create a Header and Footer that's appended to emails and on your printed displays and reports with a custom picture, logo, motto, and personal contact information. Follow the steps below to customize your Header and Footer.

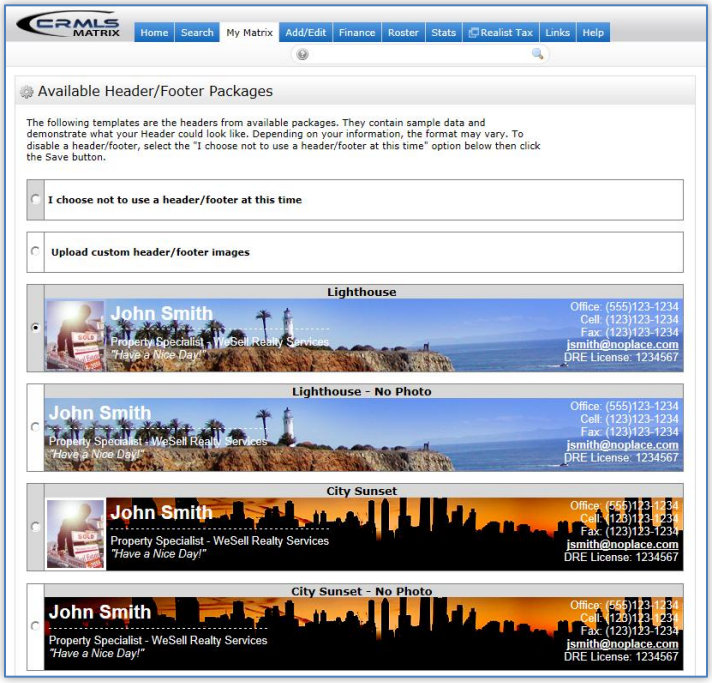
1. Click the **Settings** link on the **My Matrix** Tab.



2. Click the **Header & Footer** link.



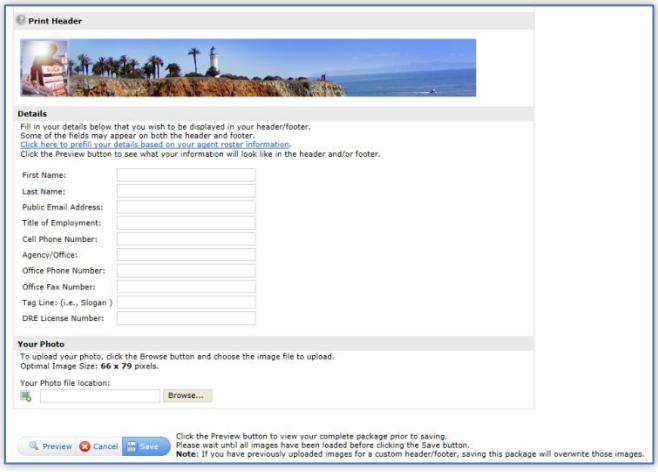
3. Select one of the Available Header/Footer Packages.



Note: *If you do not want to include your photo in the header/footer, select one of the No Photo headers/footers.*

4. Click the **Next: Set my Information** button when you are done selecting a header/footer package.

5. Scroll down to the Details section and click the **Click here to prefill your details** link to pre-fill your contact information from the Matrix roster. Alternatively, you can manually enter your contact information. The information you enter will be displayed on all of your client portal and report headers and footers.


Print Header
Details
Fill in your details below that you wish to be displayed in your header/footer.
Some of the fields may appear on both the header and footer.
Click here to prefill your details based on your agent roster information.
Click the Preview button to see what your information will look like in the header and/or footer.
First Name:
Last Name:
Public Email Address:
Title of Employment:
Cell Phone Number:
Agency/Office:
Office Phone Number:
Office Fax Number:
Tag Line: (i.e., Slogan)
DRE License Number:
Your Photo
To upload your photo, click the Browse button and choose the image file to upload.
Optimal Image Size: 66 x 79 pixels.
Your Photo file location:
Browse...
Preview
Cancel
Save
Click the Preview button to view your complete package prior to saving.
Please wait until all images have been loaded before clicking the Save button.
Note: If you have previously uploaded images for a custom header/footer, saving this package will overwrite those images.

6. If you selected a header/footer that allows you to include your photo, click the **Browse** button.

7. Locate and select the photo you want to upload.

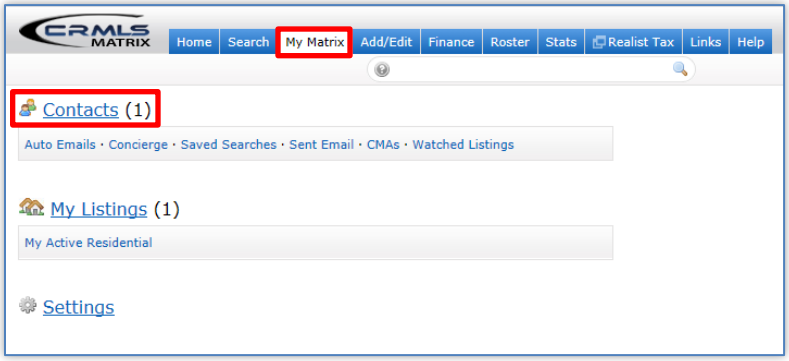
8. Click the **Preview** button to preview your header and footer.

9. Click the **Save** button to save your header and footer.

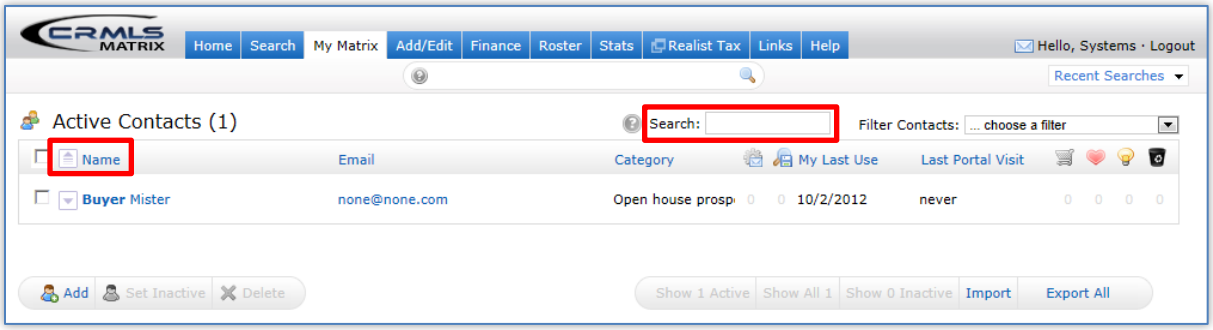
CHECK YOUR CONTACTS

Follow the steps below to verify that all of your contacts were migrated to the Matrix platform.

1. Click the **Contacts** link on the **My Matrix** tab.



2. Verify that all of your contacts were migrated. To sort your contacts alphabetically, click the **Name** link. To search for a contact, type a name in the **Search** field.



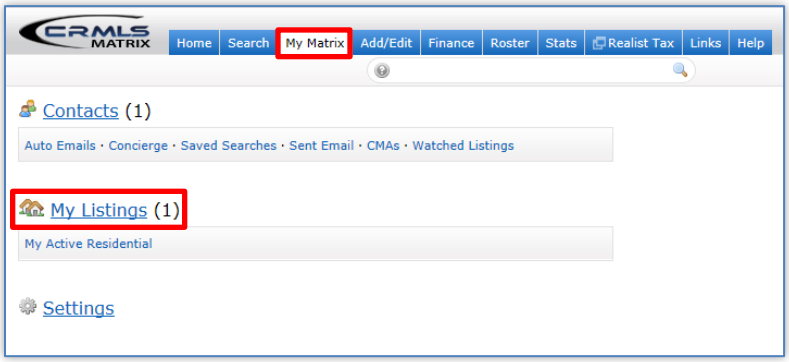
***Note**: Contacts must contain a first name, last name and e-mail address otherwise they will not migrate to Matrix.*

If you are missing any contacts, please contact CRMLS Customer Care for assistance.

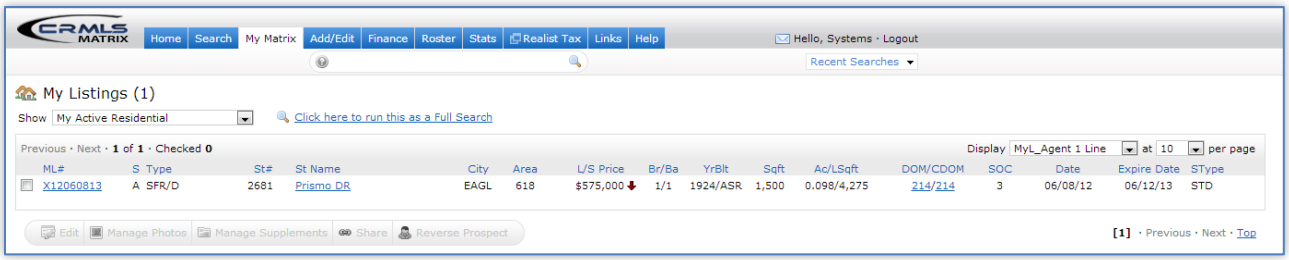
CHECK YOUR LISTINGS

Follow the steps below to verify that all of your listings were migrated to the Matrix platform.

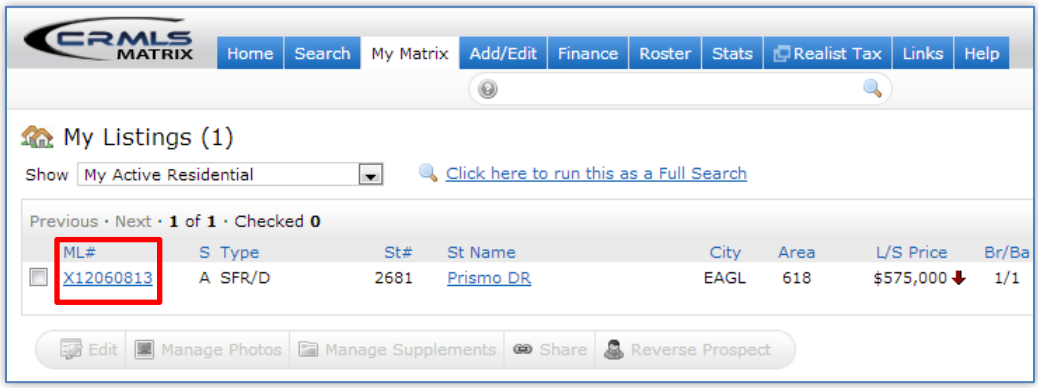
1. Click the **My Listings** link on the **My Matrix** tab.



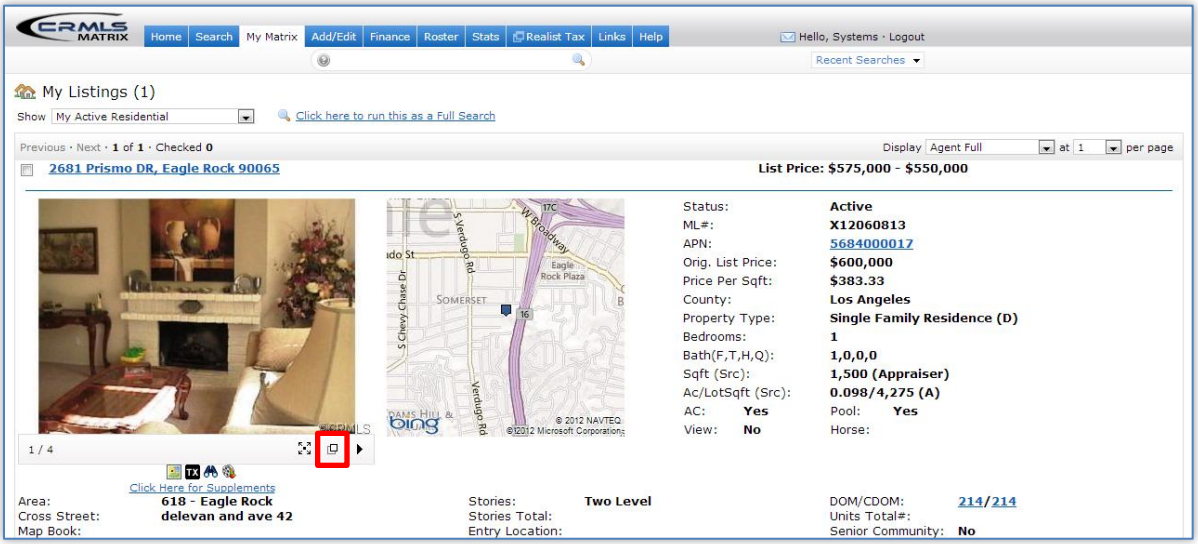
2. Verify that all of your listings were migrated to the Matrix platform. If you have multiple listings, you may need to click the **Next** link at the bottom of the list to move to subsequent pages of listings.


My Listings (1)
Show My Active Residential
Click here to run this as a Full Search
Previous · Next · 1 of 1 · Checked 0
ML# S Type St# St Name City Area L/S Price Br/Ba YrBlt Sqft Ac/LSqft DOM/CDOM SOC Date Expire Date SType
X12060813 A SFR/D 2681 Prismo DR EAGL 618 $575,000 1/1 1924/ASR 1,500 0.098/4,275 214/214 3 06/08/12 06/12/13 STD

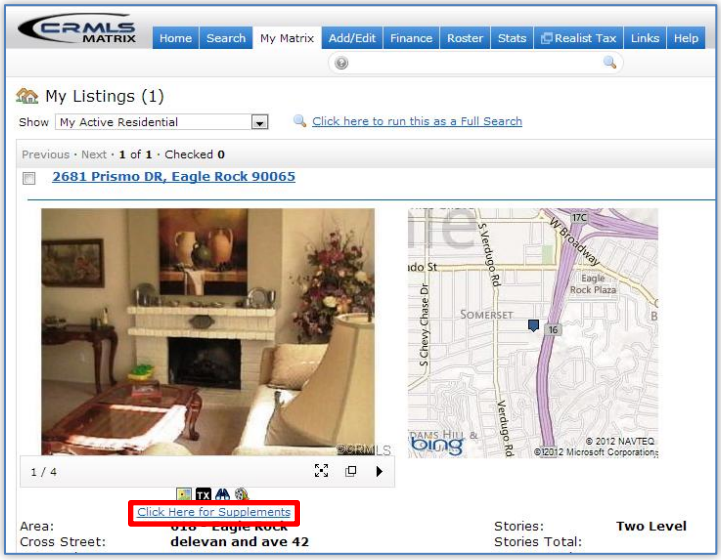
3. Once you've verified that all of your listings have been migrated, click the **ML#** link for the first listing in the list.



4. To verify that all of your listing's photographs were migrated, click the **Open all** icon and review your photos.



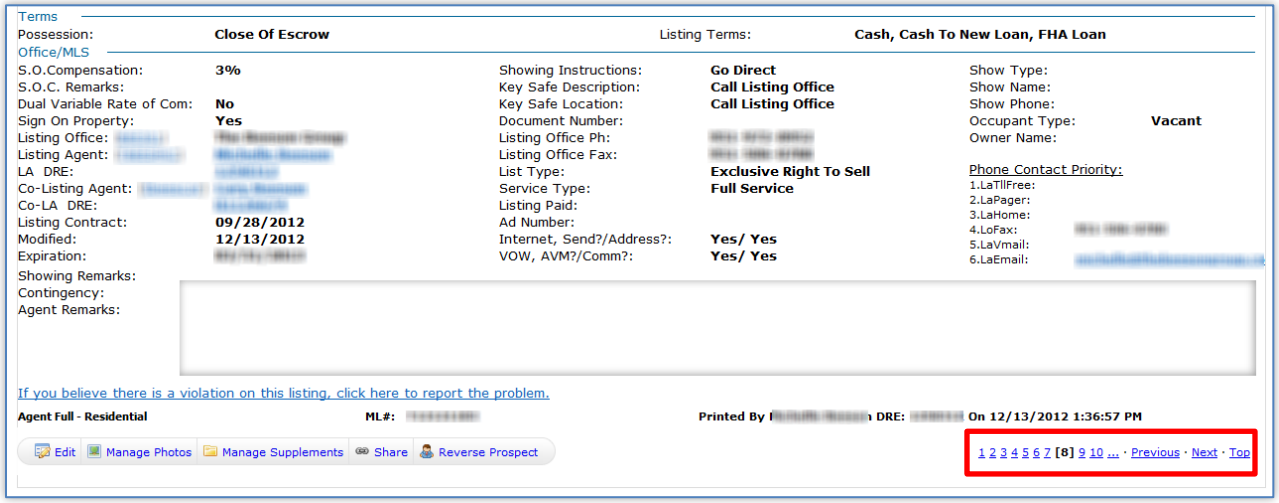
5. If your listing contains supplements, click the **Click Here for Supplements** link and verify that all of the listing's supplements were migrated.



6. Scroll down the page and check all of the listing's details and verify that they are correct. If any of your listings have incorrect information, make a note of it and contact CRMLS Customer Care.

***Note**: If you do not see a field that was included in your previous MLS, check the Property Description and Agent Remarks field for the information.*

7. Click the **Next** link at the bottom of the listing to move to the next listing.



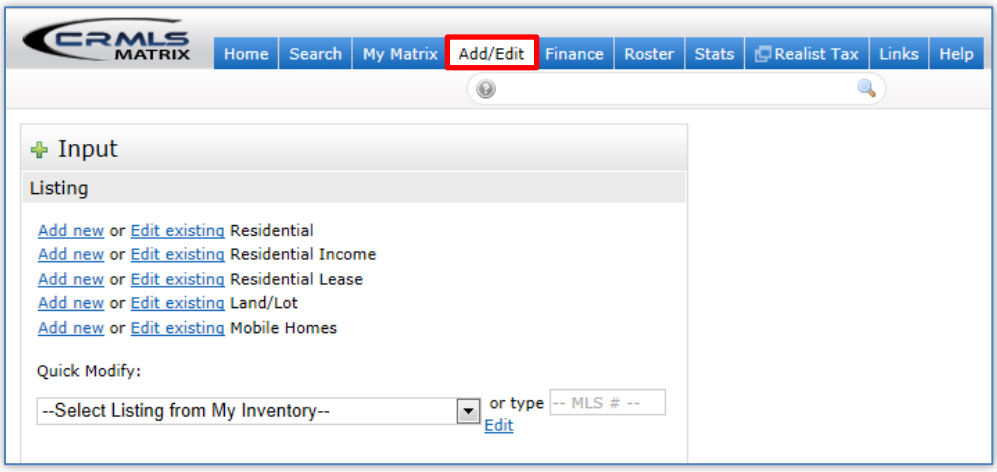
8. Repeat steps 4 through 7 to verify the rest of your listing.

***Note**: If you are missing listings or notice any problems with your listings, please contact CRMLS Customer Care.*

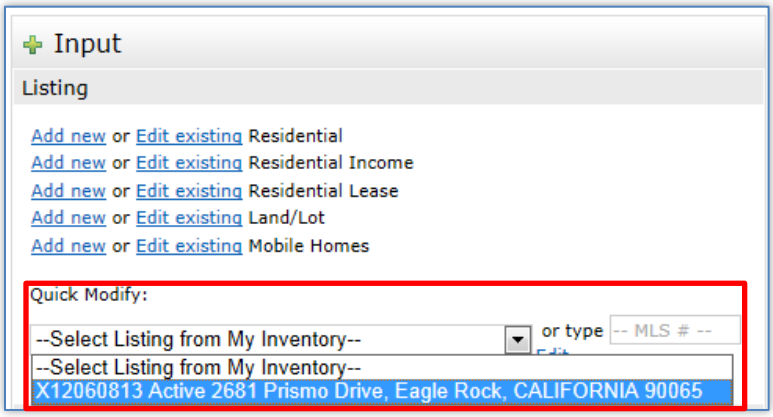
UPDATE YOUR LISTINGS

Some fields that were not required or that did not exist in Tempo may now be required fields in the Matrix platform. To avoid potential violations, you will need to update all of your listings and fill out all newly required fields. Follow the steps below to update your listings.

1. Click the **Add/Edit** tab.

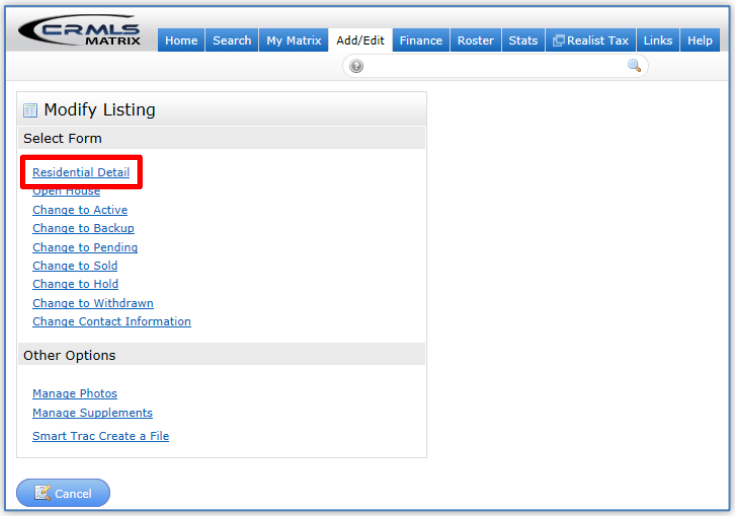


2. Select the first listing you want to modify in the Quick Modify drop-down menu.

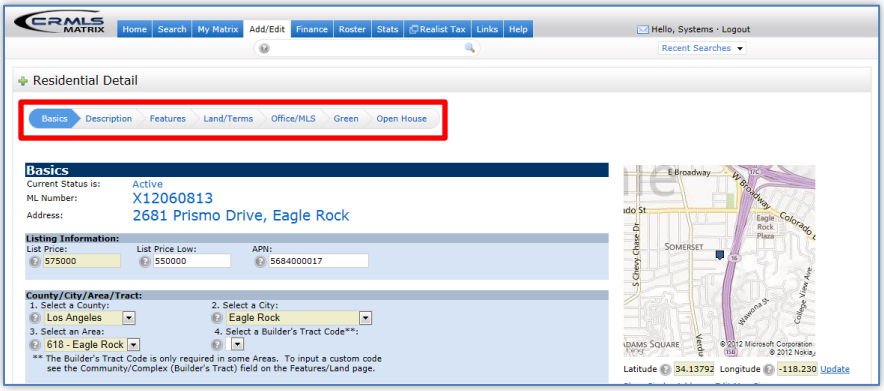

Input
Listing
Add new or Edit existing Residential
Add new or Edit existing Residential Income
Add new or Edit existing Residential Lease
Add new or Edit existing Land/Lot
Add new or Edit existing Mobile Homes
Quick Modify:
--Select Listing from My Inventory--
or type
-- MLS # --
--Select Listing from My Inventory--
X12060813 Active 2681 Prismo Drive, Eagle Rock, CALIFORNIA 90065

***Note**: You can also type the Multiple Listing Number in the **ML#** field and click **Edit**.*

3. Click the **Detail** link on the Modify Listing screen. Next, you will see the Listing input wizard.

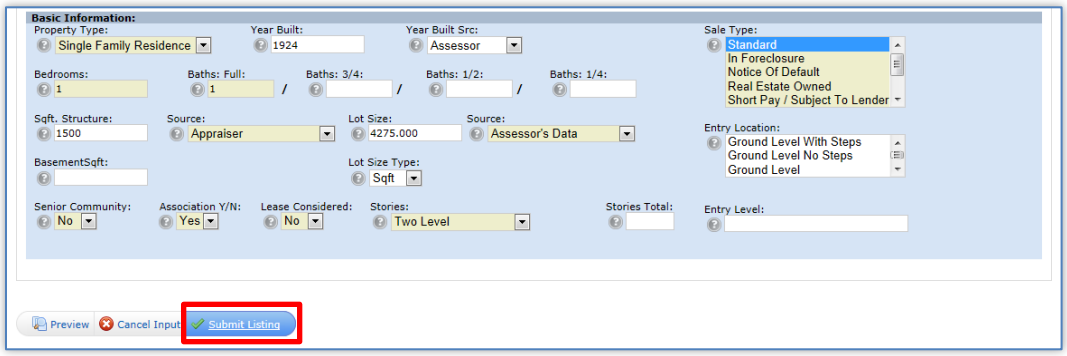


4. Click the tabs to move through each section of the Listing Input Wizard and make changes to your listing as necessary.

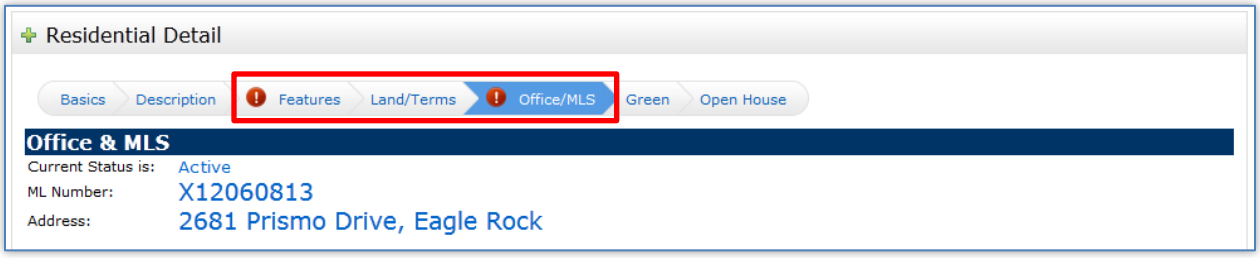

Residential Detail
Basics
Description
Features
Land/Terms
Office/MLS
Green
Open House
Basics
Current Status is: Active
ML Number: X12060813
Address: 2681 Prismo Drive, Eagle Rock
Listing Information:
List Price: 575000
List Price Low: 550000
APN: 5684000017
County/City/Area/Tract:
1. Select a County: Los Angeles
2. Select a City: Eagle Rock
3. Select an Area: 618 - Eagle Rock
4. Select a Builder's Tract Code**:
** The Builder's Tract Code is only required in some Areas. To input a custom code see the Community/Complex (Builder's Tract) field on the Features/Land page.
Latitude 34.13792 Longitude -118.230 Update

All fields highlighted in yellow are required and must be filled out before you can submit your listing.

5. When you are done modifying your listing, click **Submit Listing** to save your changes.



If any required fields are missing information or if the listing contains a warning or errors, the error or warning symbol will appear next to each section and field that needs to be updated. Click the tab with the error or warning and make corrections as necessary. All errors must be corrected before the listing can be submitted.



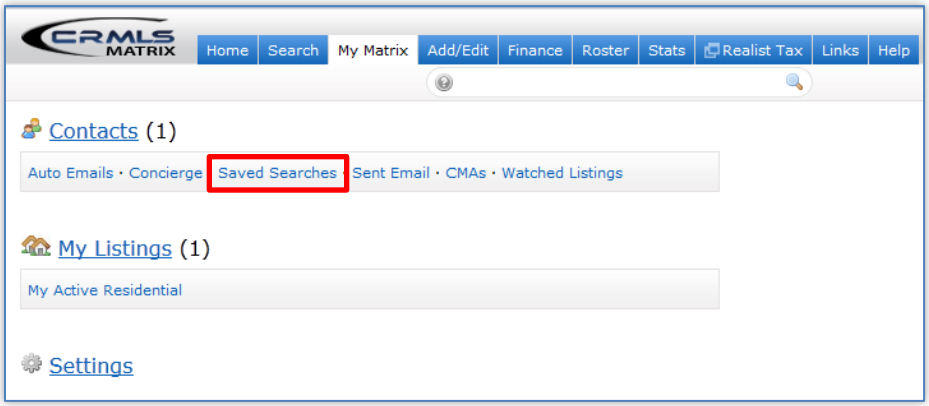
6. Repeat steps 1 through 5 to update the rest of your listings.

CHECK YOUR SAVED SEARCHES AND AUTO PROSPECTS

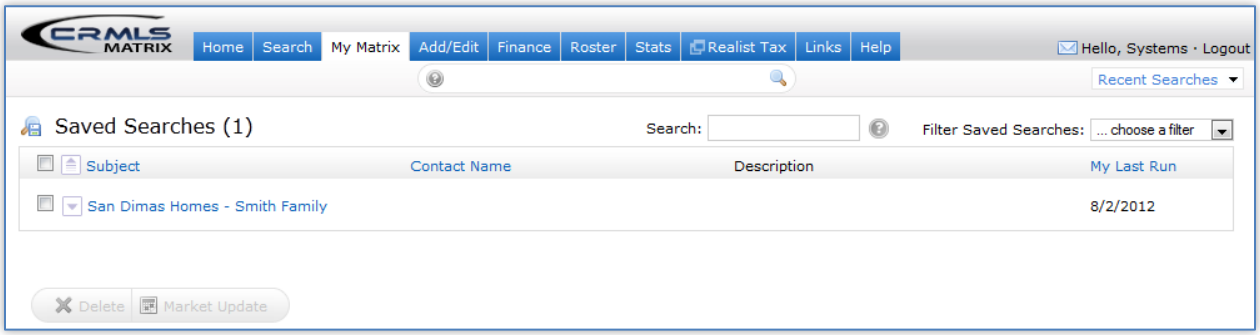
Save Searches and Auto Prospects from Tempo were migrated to the Matrix platform as saved searches. Follow the steps below to verify that your Saved Searches and Prospects were migrated to Matrix.

***Note**: Auto Prospects that were migrated to Matrix have been disabled. To re-enable your Auto Prospects, refer to the "Re-enable Client Gateways (Auto Emails)" section in this manual.*

1. Click the **Saved Searches** link on the **My Matrix** tab.



2. Verify that your saved searches were migrated.



***Note**: Due to field level differences between the Matrix and Tempo platforms, a small number of Saved Searches and Prospects may not migrate to the Matrix platform.*

If you are missing any Saved Searches or Auto Prospects, contact CRMLS Customer Care.

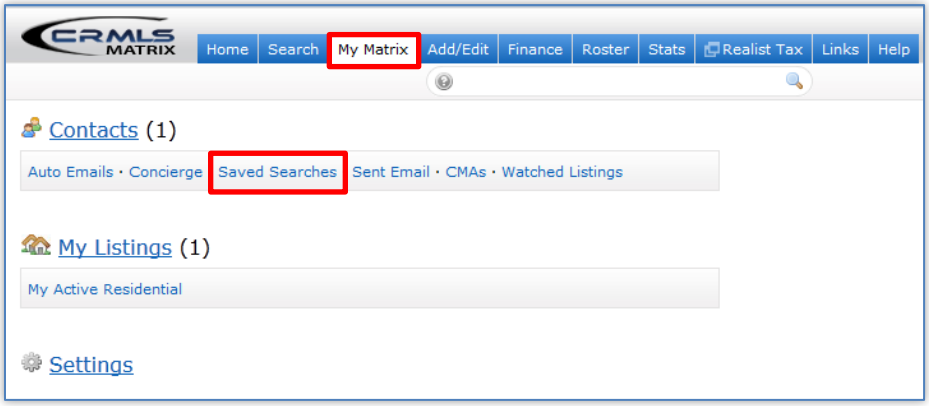
RE-ENABLE CLIENT GATEWAYS (AUTO EMAILS)

Client Gateways from Tempo are equivalent to the Matrix platform's Auto Email feature. The Auto Email feature sends listings to your clients and allows them to view and rate listings in their very own Client Portal.

***Note**: Auto Emails in Matrix will only allow your clients to view Customer Displays and Reports in the Client Portal. Additionally, Matrix will only allow you to activate up to 250 Auto Emails.*

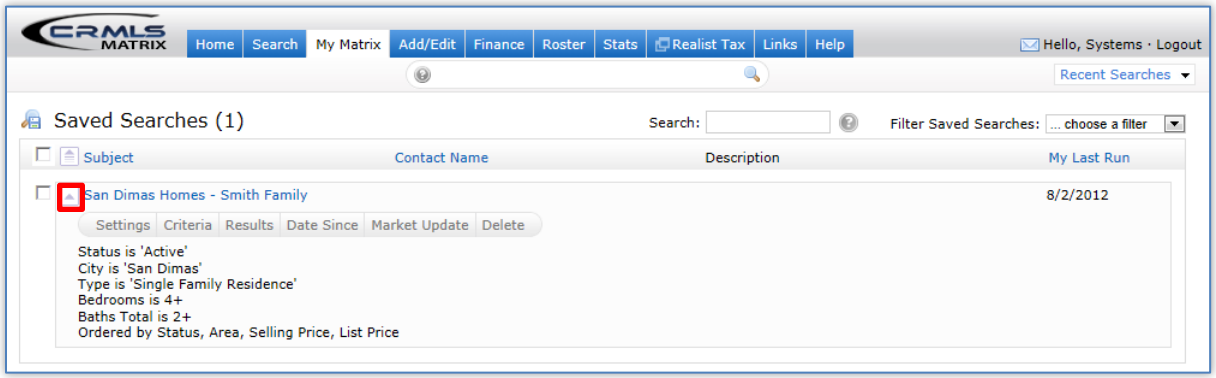
Follow the steps below to turn your Saved Searches into Auto Emails for your clients.

1. Click the **Saved Searches** link on the **My Matrix** tab.



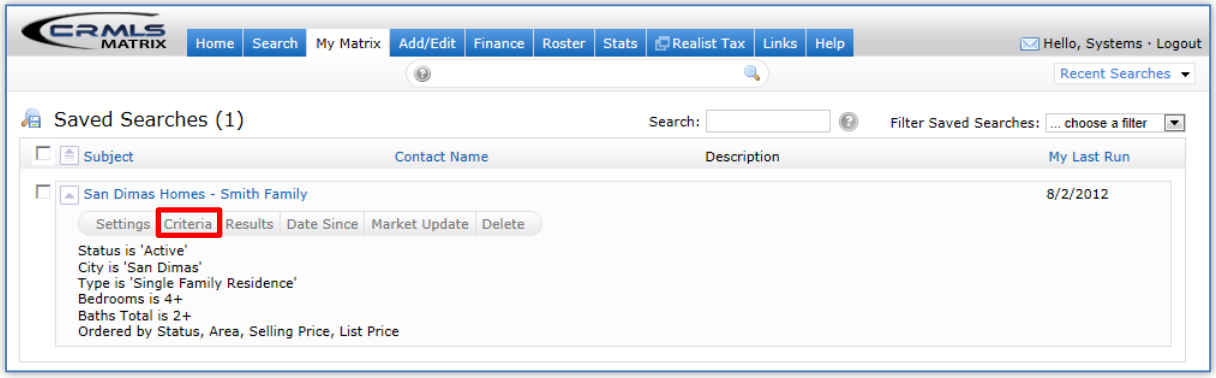
2. Locate the Saved Search you want to turn into an Auto Email notification.

3. Click the triangle next to the Saved Search to display the Saved Search options.

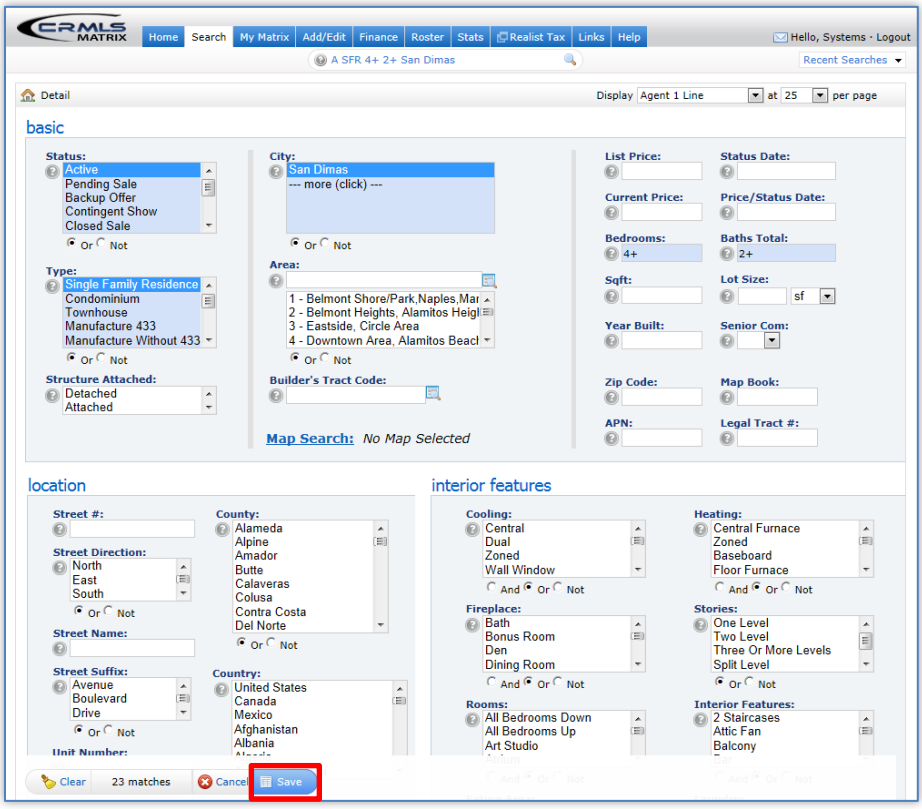


***Note**: If you have a large number of Saved Searches, you can filter them using the **Filter Saved Searches** drop-down menu*.

4. Click **Criteria** to update your Saved Search criteria before turning it into an Auto Email.



5. Review and modify your search criteria as necessary, then click **Save**.



***Note**: Saved Searches that return more than 250 listings cannot be turned into an auto Email.*

6. Click the **Turn this Saved Search into an Auto Email** link.

7. Verify that the **Contact** selected is correct in the drop-down list.

8. If you want to send the auto email to an additional email address, enter the address in the **CC**: field.

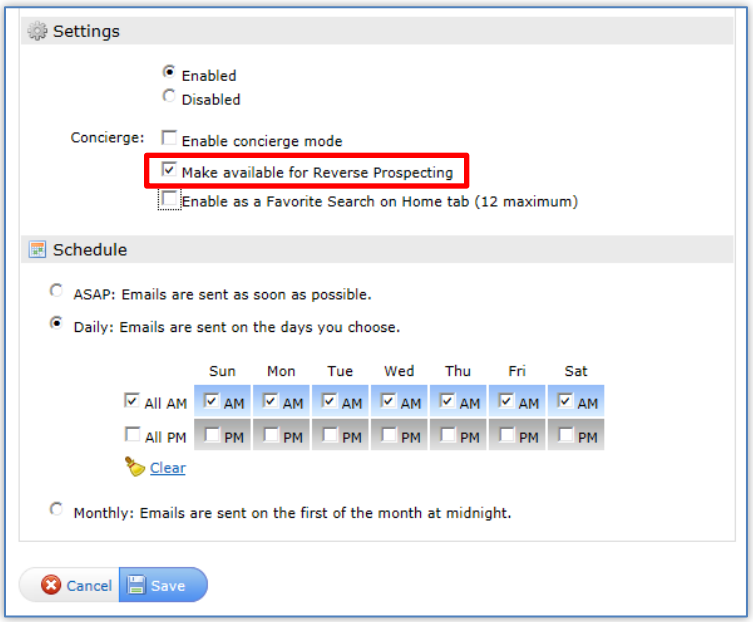
9. Select **BCC me a copy of all emails** to receive a blind carbon copy of auto emails sent to the client.

10. Enter a subject for the email in the **Subject** field.

11. Matrix will automatically populate the **Message** field. If you want to add a personal message before the auto populated text, enter it in the **Message** field.

***Note**: When sending the initial auto email to a client, you should leave the Message field blank. This will send out a message welcoming your client to the Portal and provide them with general information on how to work with the Portal.*

12. Select **Make available for Reverse Prospecting** to allow a listing agent to see if their listing was sent in an auto email.



***Note**: Client information is never shared with Listing Agents when Reverse Prospecting is enabled.*

13. Select a Schedule setting to specify when auto emails are sent to your client. The **Daily** setting allows you to send emails every day at 8:00 a.m. or 6:00 p.m., the **ASAP** setting sends auto emails as soon as possible, and the **Monthly** setting sends emails at midnight on the first of the month.

14. Click the **Save** button to save your Auto Email.

***Note**: If your Auto Email returns more than 250 listings, you will receive a message letting you know that your Auto Email has been disabled. To reactivate your auto email, access your Saved Search in the My Matrix tab, narrow your search criteria, and re-activate the Auto Email. If necessary, you can set up multiple saved searches for a single client.*

REVIEW ADDITIONAL PRODUCTS

If you are using a back office system or a third party application that utilizes MLS data, you will need to contact the vendor to ensure that those systems are functioning properly post conversion. IDX links created in Smart Desk should continue to function, however, it is recommended that you check the links after conversion. See the Smart IDX User Manual for instructions on creating Smart IDX links.

***Note**: If you encounter any issues with Smart IDX links, please contact CRMLS Customer Care for assistance.*

The following CRMLS products will automatically be updated during the conversion process: Mercado, Goomzee, Cloud CMA, Smart Desk, CARETS Commercial (up to two day delay for access), and Listingbook (up to one week delay for access).

DOWNLOAD THE LATEST LISTING INPUT FORMS

Before you add or modify listings, be sure to download the new Listing Input Forms by clicking the following link: http://www.crmls.org/centsite/listing_input_forms.htm

Download the Latest 1004MC Solution and Manual

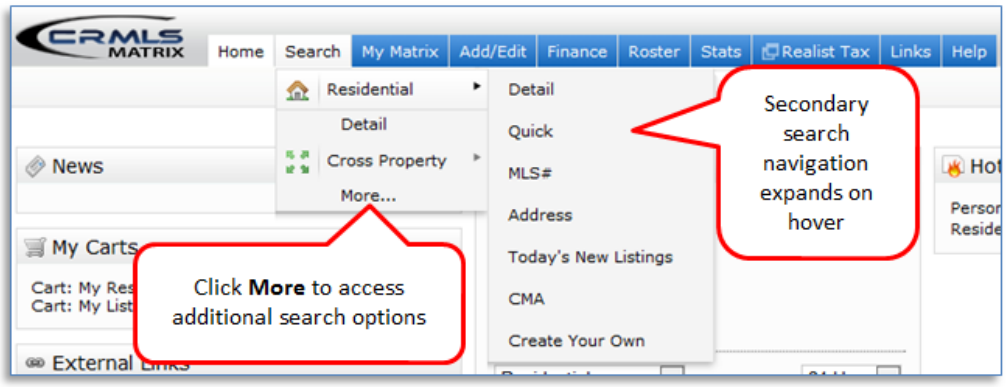
Before generating a 1004MC report, download the latest versions of the CRMLS 1004MC Solution and 1004MC Solution Manual from the **Download Center** on the Matrix platform's **Help** tab. The 1004MC Solution Manual contains complete details on exporting comparables from the Matrix platform and using the 1004MC Solution spreadsheet.

SEARCHING FOR LISTINGS

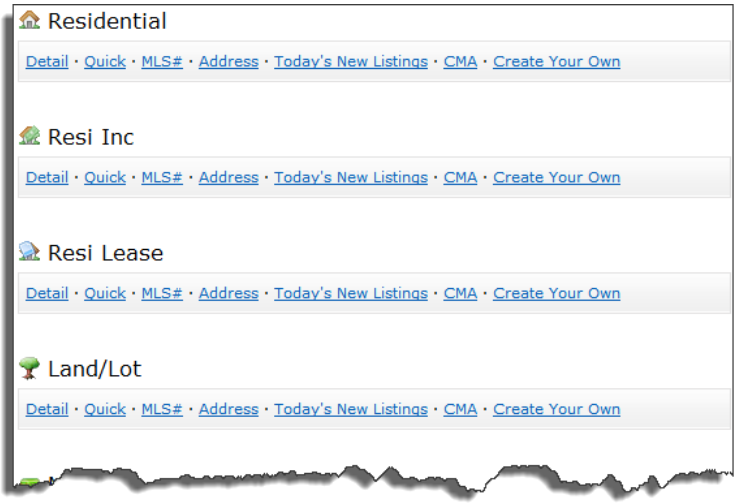
BASIC SEARCH

Follow the steps below to perform a search for listings. This example will guide you through performing a basic Residential search, however, the steps for performing a Residential Income, Residential Lease, Land/Lot, or Mobile Home search are similar.

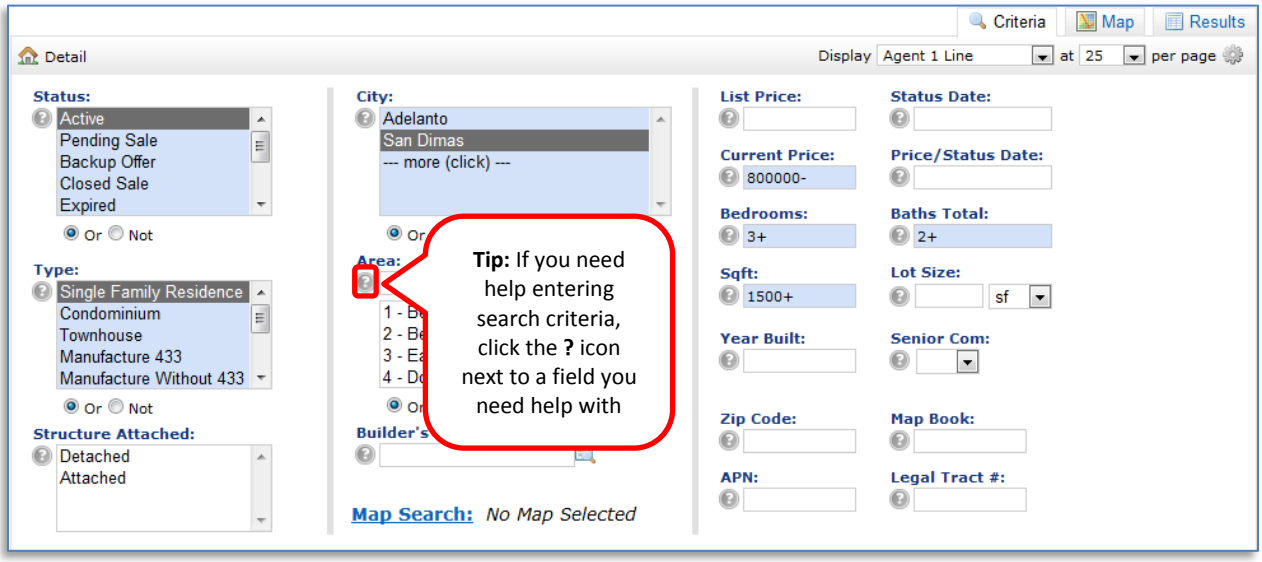
1. The Matrix platform's navigation menu bar allows you to access the search features in several ways. When you hover over the search tab you will see a drop down menu from which you can select the type of search you want to run.



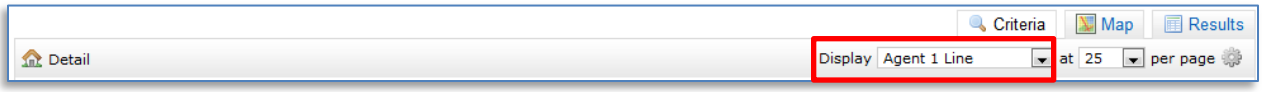
Alternatively, you may click on the search tab itself to view all the search options on one screen such as in the picture below.


Residential
Detail · Quick · MLS# · Address · Today's New Listings · CMA · Create Your Own
Resi Inc
Detail · Quick · MLS# · Address · Today's New Listings · CMA · Create Your Own
Resi Lease
Detail · Quick · MLS# · Address · Today's New Listings · CMA · Create Your Own
Land/Lot
Detail · Quick · MLS# · Address · Today's New Listings · CMA · Create Your Own

2. After you've selected the property type you want to search for (such as Residential Detail), input the search criteria you are interested in searching for.



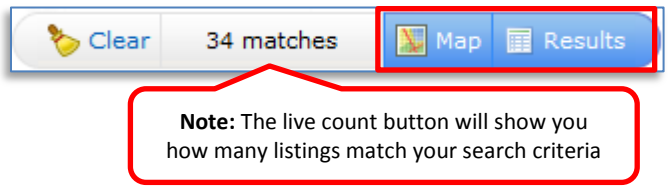
3. Select a search results display format from the **Display** drop down box. By default, the system will select Agent 1 Line.



4. Select the number of listings you want the search results to display per page. Available options are 10, 25, 50, or 100 listings per page.

5. Your default display and search criteria options can be set by clicking on the **default** icon.

6. To generate the search results, you can click on either the Map or Results button. The results page will be discussed further later in this manual.



ADDITIONAL SEARCH OPTIONS

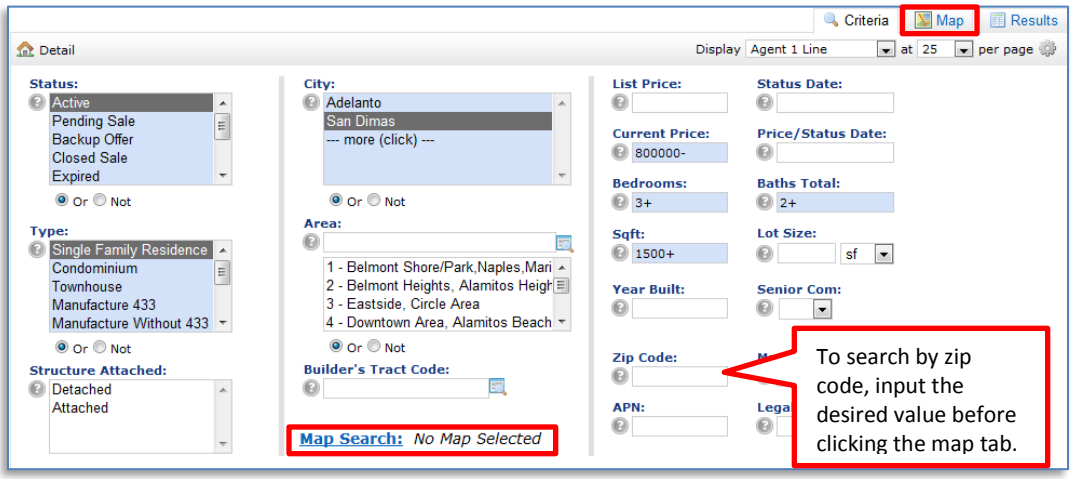
Refer to the table below for a list of special characters allowed for search fields.

Special Character	Description	Example
+	**Greater than or equal to:** Allows you to search for values that are greater than or equal to the value you entered. When using the + character, it must follow the value you enter.	*Bathrooms: 3+* Finds all listings that have 3 or more bathrooms.
–	**Less than or equal to:** Allows you to search for values that are less than or equal to the value you entered. When using the – character, it must follow the value you enter.	*Bathrooms: 4-* Finds all listings that have 4 bathrooms or less.
–	**Range:** Allows you specify a numeric range.	*List Price: 150000-200000* Finds all listings with a list price ranging from $150,000 to $200,000.
,	**Either/Or:** Allows you to enter multiple values in a single field.	*Area: 689, 690* Finds all listings that are located in either area 689 or 690.
*	**Wildcard:** Searches for unknown letters and/or numbers.	*Street Name: *Park* Finds all listings that are located on a street that ends with the word Park. *Street Name: Park** Finds all listings that are located on a street that begins with the word Park. *Property Description/Agent comments: *key word** Finds all listings with the “key word” in the property description or office comments. Use commas to separate multiple key words.
!	**Exclude Selections:** Allows you to exclude listings that contain a specific value for search criteria. When using the ! character, it must precede the value you enter.	*Year Built: !*1960** Excludes all listings that contain properties that were built in 1960.

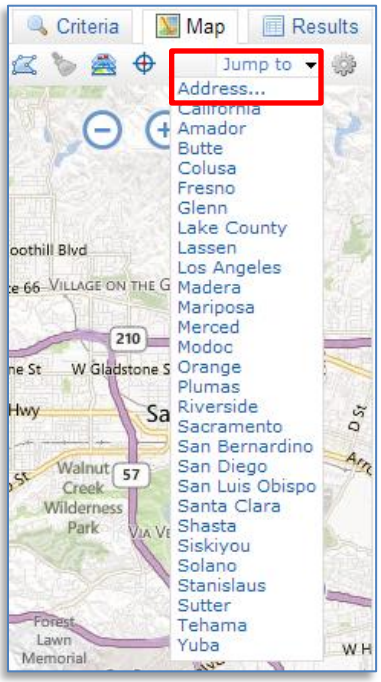
MAP SEARCH

Follow the steps below to search for properties within a selected area on a map.

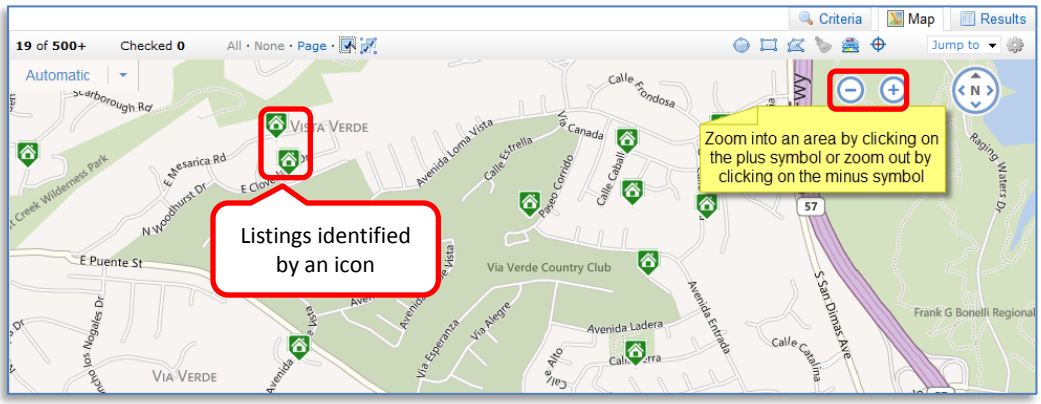
1. On the Matrix home page, click on the **Search** tab and select the Detail or Quick search according to property type. Once you are on the search page, input your search criteria (excluding a City or Area) then click on the **Map** tab or the **Map Search** link.



2. To move the map to a specific county, select the county from the drop down **Jump to** menu. Or you can move the map to a city or specific address by selecting **Address** from the list.

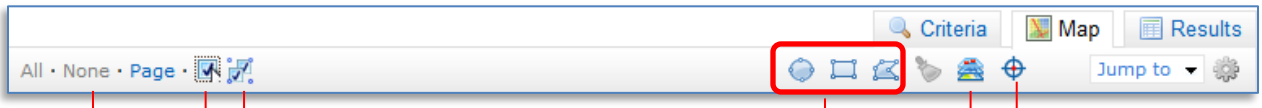


3. Click and hold on the map as you move your mouse in order to pan the view and locate an area for searching. You can also zoom into or out of an area by using the controls on the map as displayed below. The listings will auto-populate and will be identified by a pin in the map.



MAP SEARCH TOOL BAR

The map search tool bar includes a robust selection of tools to maximize efficiency when working with the map.



All, None, and Page allows you to select or unselect properties in your search results

Clicking the multi-select icon allows you to click and drag to select all listings within a rectangular area

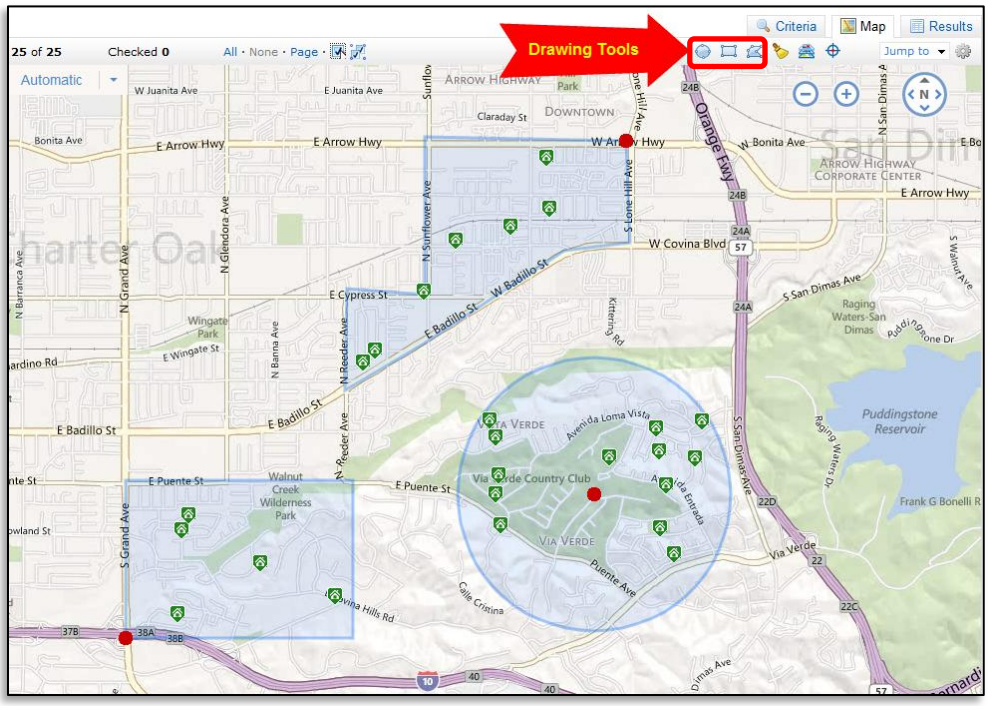
Select to draw a search area on the map using one of these shapes

Re-center map

Clicking the single select icon toggles the map into/from selection mode. When enabled, a click on any map pin immediately selects that listing.

Shows map layers such as Zip Code, City, and MLS Area

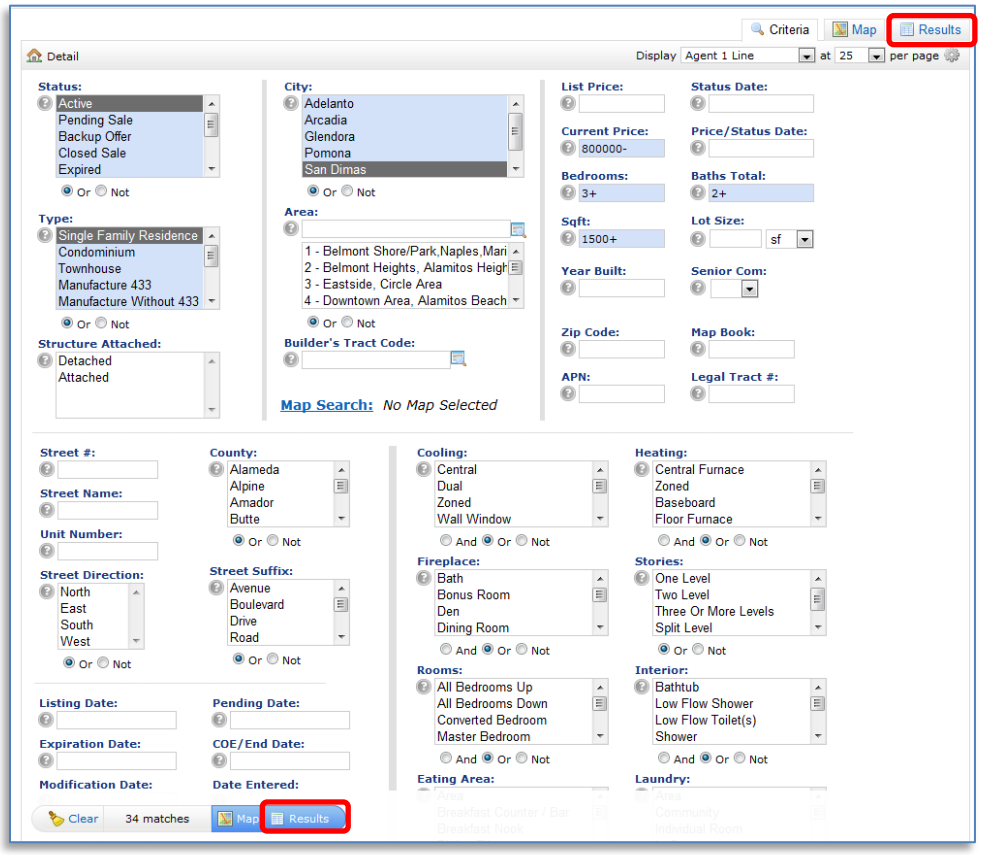
4. Use the drawing tools to select a search region on the map by drawing boundaries around the desired areas. You can choose to draw a radius, rectangle, or a polygon. Examples of all three are shown below.



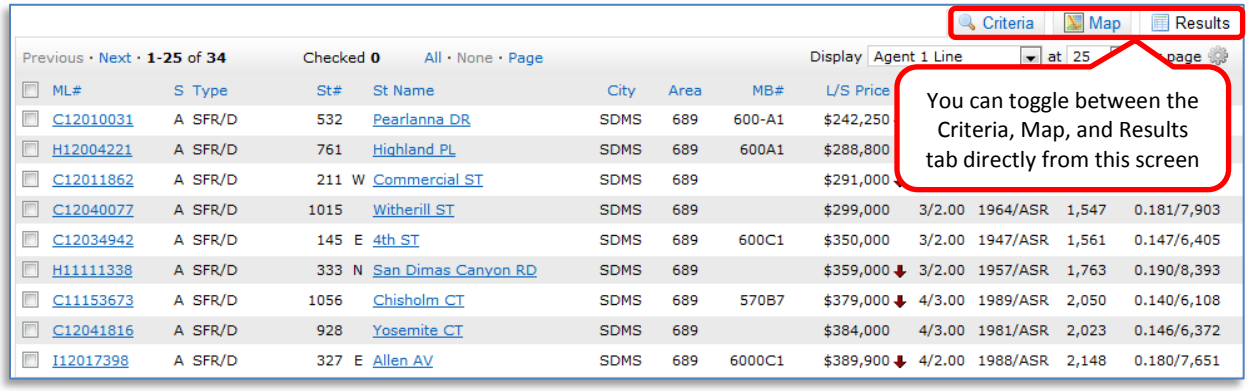
Note: When using the map search, do not select a city or MLS area in the basic search criteria page as this may conflict with the search regions you draw and could result in no listing matches.

VIEWING SEARCH RESULTS

From the **Search page**, click on the **Results** tab or the **Results button**.



Once you generate the **Results**, Matrix will display a search result window like this one:


Criteria
Map
Results
Previous · Next · 1-25 of 34
Checked 0
All · None · Page
Display Agent 1 Line at 25 page
You can toggle between the Criteria, Map, and Results tab directly from this screen
ML# S Type St# St Name City Area MB# L/S Price
C12010031 A SFR/D 532 Pearlanna DR SDMS 689 600-A1 $242,250
H12004221 A SFR/D 761 Highland PL SDMS 689 600A1 $288,800
C12011862 A SFR/D 211 W Commercial ST SDMS 689 $291,000
C12040077 A SFR/D 1015 Witherill ST SDMS 689 $299,000 3/2.00 1964/ASR 1,547 0.181/7,903
C12034942 A SFR/D 145 E 4th ST SDMS 689 600C1 $350,000 3/2.00 1947/ASR 1,561 0.147/6,405
H11111338 A SFR/D 333 N San Dimas Canyon RD SDMS 689 $359,000 3/2.00 1957/ASR 1,763 0.190/8,393
C11153673 A SFR/D 1056 Chisholm CT SDMS 689 570B7 $379,000 4/3.00 1989/ASR 2,050 0.140/6,108
C12041816 A SFR/D 928 Yosemite CT SDMS 689 $384,000 4/3.00 1981/ASR 2,023 0.146/6,372
I12017398 A SFR/D 327 E Allen AV SDMS 689 6000C1 $389,900 4/2.00 1988/ASR 2,148 0.180/7,651

SEARCH RESULTS LINKS, ICONS, AND DISPLAYS

Refer to the table below for a list of links, icons, and displays available on the search results window.

Link or Display	Description
Next	Click the **Next** link to view the next page of search results.
Previous	Click the **Previous** link to view the previous page of search results.
All, None, Page	Click the **All, None, or Page** link to quickly select/un-select all listings on the search results page
1 [2] 3 4 5 6 7	Click a **number** to jump to that page of search results. For example, click **2** to view the second page of search results. The number in brackets indicates the current search results page that you're viewing.
Listing # P123456	Click the **listing number** link to view the full listing.
St Name (Map) Main St	Click the **street name** to view the listing on a map.
DOM/CDOM	Click the **DOM** link to view a history of the listing or the **CDOM** link to view a comprehensive listing history of the property. The history will include price changes, status changes, selling office compensation changes, and the User ID of the changing agent or entity. **Note:** *To view property history by APN and/or Street Address, click the **Property History** link on the Search tab.*
Display	Select a display format from the **Display** drop down box to change the search results display one of the various display formats available. **Note:** *You can change the default result display on the search page only. You can also change your listings per page from 25 to 10, 50, or 100.*
Criteria	The search criteria you selected is displayed at the bottom left side of the search results window.

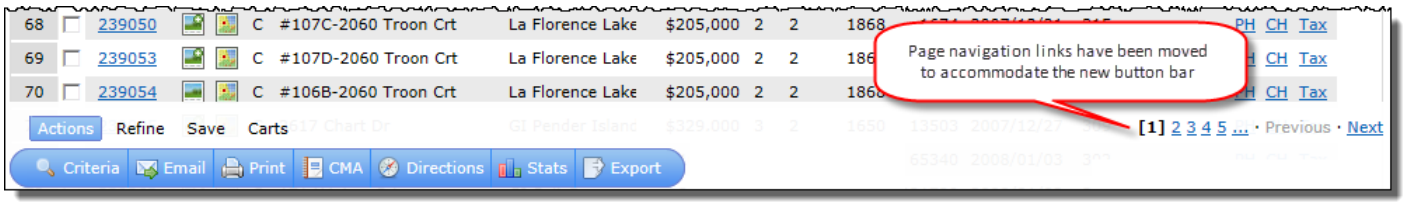
SEARCH RESULTS ICONS

Refer to the table below for a list of icons available on the search results window.

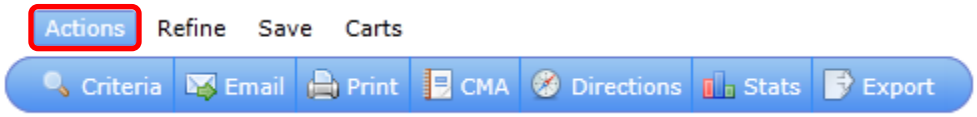
Icon	Description
	Click the selection box for each listing you would like to Narrow, Discard, Save, Sort, Print, Export, Email, or Map.
	Indicates that either the list price or sale price has changed. The **up arrow** means that the list price or sale price has increased and the **down arrow** means that the list or sale price has decreased. To view the listing's history, click the **DOM** or **CDOM** link.
	Click the **portrait** icon to view the photo(s) for this listing. Listings with a portrait icon with a plus in the upper right hand corner indicate that there are multiple photos available for that listing.
	Click the **map** icon to view the listing on a map.
	Click the **Realist Tax** icon to open the listing in Realist Tax. Realist Tax combines public records, MRMLS listing data, maps, and market data in to a single research tool.
	Click the **binoculars** icon to add the listing to your Watched Listings. To access your watched listings, click the **Watched Listings** link in the **My Matrix** tab, or via the **Watched Listings Widget** on the **Home** tab.
	Click the **virtual tour** icon to view the external virtual tour website for this property.

SEARCH RESULTS BUTTONS

The Matrix features a consolidated task driven button bar. Buttons are grouped together by tasks for actions that can be performed while viewing listing search results. The button bar remains consistent across results page and map views. Page navigation links are located on the lower right side of the page.

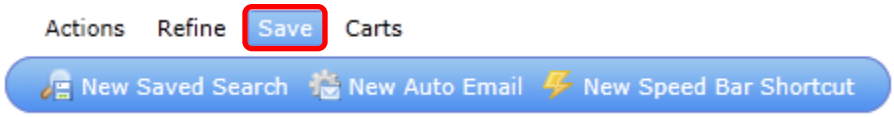


1) **Actions -** this default button view contains all primary actions you will perform with results.



2) **Refine -** this button view allows you to refine the search results.

3) **Save -** this button view provides access to creating all the "Save" features.



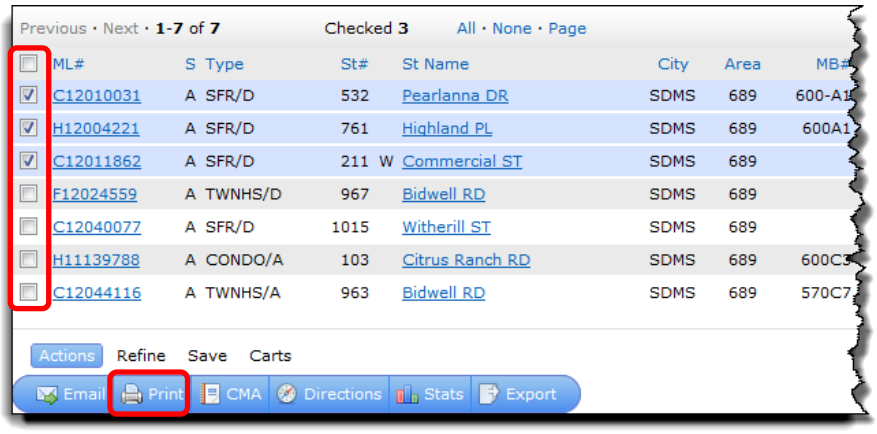
4) **Carts –** this button view provides access to all cart actions.

PRINTING LISTINGS AND REPORTS

Follow the steps below to print listings and reports. Before you begin, make sure that you've performed a search as described in the "Searching for Listings" section on page 13 of this manual.

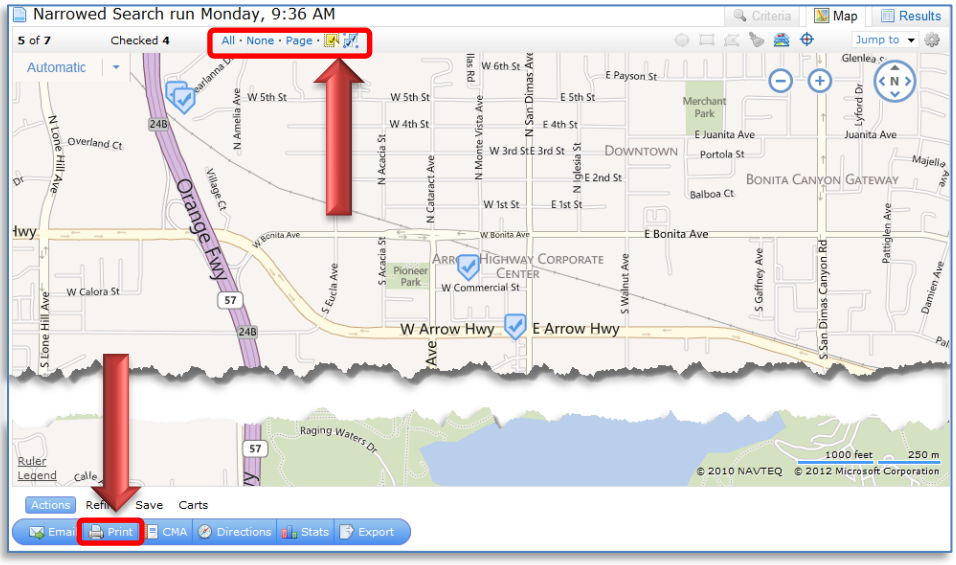
PRINTING FROM SEARCH RESULTS

From the search results screen, select one or more properties by clicking the selection boxes next to each listing. Then, under the default **actions** menu bar, click the blue **Print** button.


Previous · Next · 1-7 of 7
Checked 3
All · None · Page
ML# S Type St# St Name City Area MB#
C12010031 A SFR/D 532 Pearlanna DR SDMS 689 600-A1
H12004221 A SFR/D 761 Highland PL SDMS 689 600A1
C12011862 A SFR/D 211 W Commercial ST SDMS 689
F12024559 A TWNHS/D 967 Bidwell RD SDMS 689
C12040077 A SFR/D 1015 Witherill ST SDMS 689
H11139788 A CONDO/A 103 Citrus Ranch RD SDMS 689 600C3
C12044116 A TWNHS/A 963 Bidwell RD SDMS 689 570C7
Actions Refine Save Carts
Email Print CMA Directions Stats Export

PRINTING FROM THE MAP

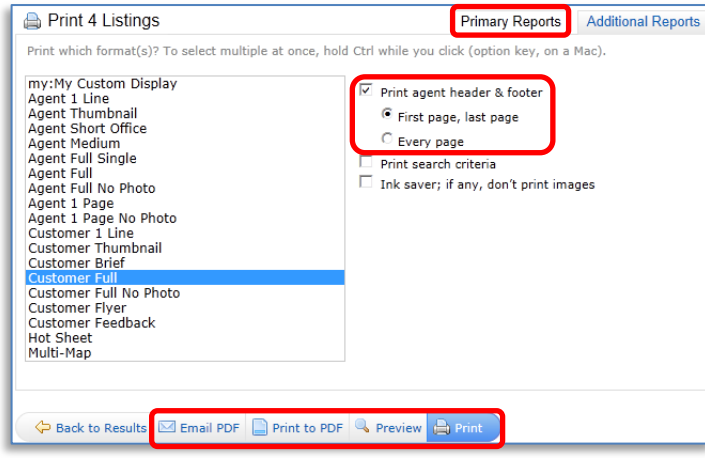
From the search results map screen, select one or more properties by using the **single** or **multi select** icon tool. Then, under the default **actions** menu bar, click the blue **Print** button.

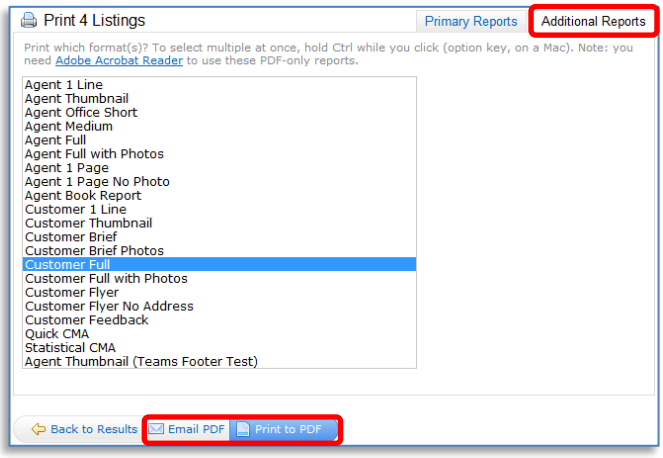


GENERATING THE PDF FILE(S)

After clicking the **Print** button, you will be presented with a selection of reports to choose from. Additionally, you will have the option of emailing a PDF report directly from this screen, previewing your file, or printing. In addition to the traditional reports, the **Primary Reports** tab will contain any custom displays you've created, while the **Additional Reports** tab will contain the Quick and Statistical CMA report.

You can select one or more reports to print by holding down the "CTRL" key on the keyboard as you make your selection. Please note that you will need to have Adobe Acrobat Reader installed on your computer. If you need to install this program, you may download a free copy from Adobe by visiting: http://get.adobe.com/reader/





Note: Google Chrome users will be unable to print the agent header/footer on every page as Chrome is inconsistent with this command.

PRINTING PDF FILE(S)

If you've selected the **Print to PDF** feature, you will have the opportunity to save the listings to your computer as a PDF file, or print. Adobe Acrobat Reader will open and display the report in a PDF format. To print, click on the **print icon** or select **print** from the file menu of your browser. When done, close the window or tab to return to Matrix.

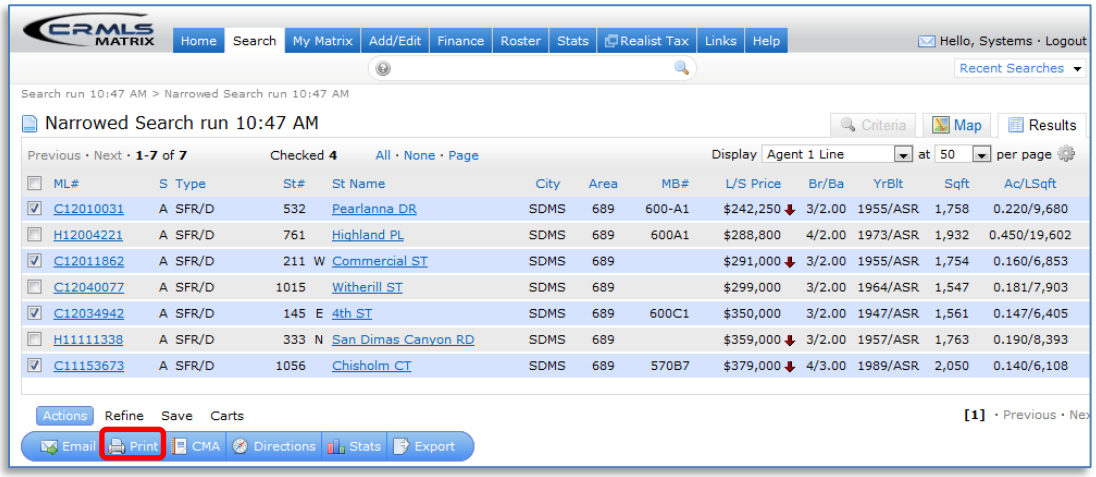
EMAILING LISTINGS

The Matrix platform allows you to email listings as reports in PDF format. Listings can also be emailed as a hyperlink to a client portal so that your clients will receive the most up to date information for listings you have selected.

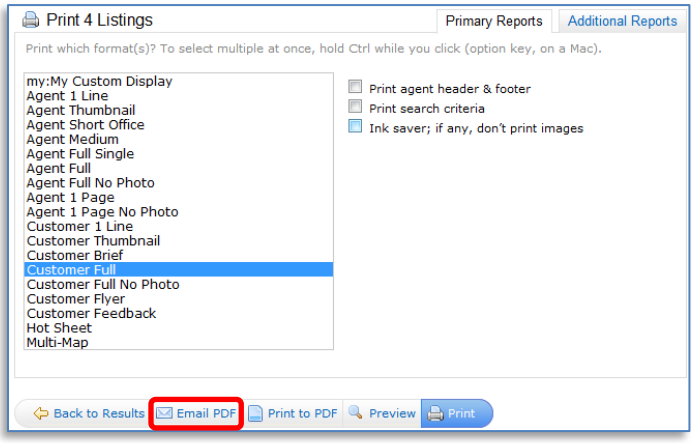
EMAILING LISTINGS AS REPORTS

Follow the steps below to email listings as a PDF report. Before you begin, make sure that you've performed a search as described in the "Searching for Listings" section of this manual.

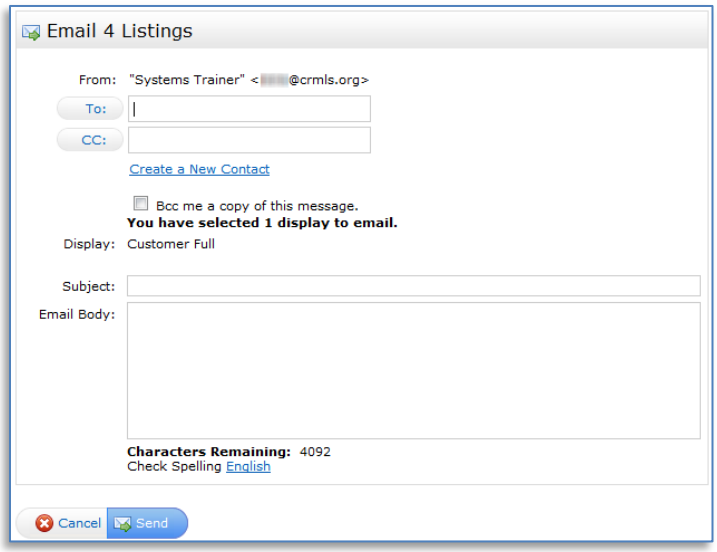
1. Click the check box next to each listing you want to include in the email.
2. Click the **Print** button.


Home
Search
My Matrix
Add/Edit
Finance
Roster
Stats
Realist Tax
Links
Help
Hello, Systems · Logout
Recent Searches
Search run 10:47 AM > Narrowed Search run 10:47 AM
Narrowed Search run 10:47 AM
Criteria
Map
Results
Previous · Next · 1-7 of 7
Checked 4
All · None · Page
Display Agent 1 Line at 50 per page
ML# S Type St# St Name City Area MB# L/S Price Br/Ba YrBlt Sqft Ac/LSqft
C12010031 A SFR/D 532 Pearlanna DR SDMS 689 600-A1 $242,250 3/2.00 1955/ASR 1,758 0.220/9,680
H12004221 A SFR/D 761 Highland PL SDMS 689 600A1 $288,800 4/2.00 1973/ASR 1,932 0.450/19,602
C12011862 A SFR/D 211 W Commercial ST SDMS 689 $291,000 3/2.00 1955/ASR 1,754 0.160/6,853
C12040077 A SFR/D 1015 Witherill ST SDMS 689 $299,000 3/2.00 1964/ASR 1,547 0.181/7,903
C12034942 A SFR/D 145 E 4th ST SDMS 689 600C1 $350,000 3/2.00 1947/ASR 1,561 0.147/6,405
H11111338 A SFR/D 333 N San Dimas Canyon RD SDMS 689 $359,000 3/2.00 1957/ASR 1,763 0.190/8,393
C11153673 A SFR/D 1056 Chisholm CT SDMS 689 570B7 $379,000 4/3.00 1989/ASR 2,050 0.140/6,108
Actions
Refine
Save
Carts
[1] · Previous · Ne
Email
Print
CMA
Directions
Stats
Export

3. Select any of the customer displays (from the Primary Report tab) or listing reports (from the Additional Reports tab) you want to email and then click the **Email PDF** button.



4. Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's email address in the **To:** field. Separate multiple recipients by putting a semi-colon (;) after each entry.



Note: *To select more than one contact in your contact list, hold down the **CTRL** key on your keyboard as you select them.*

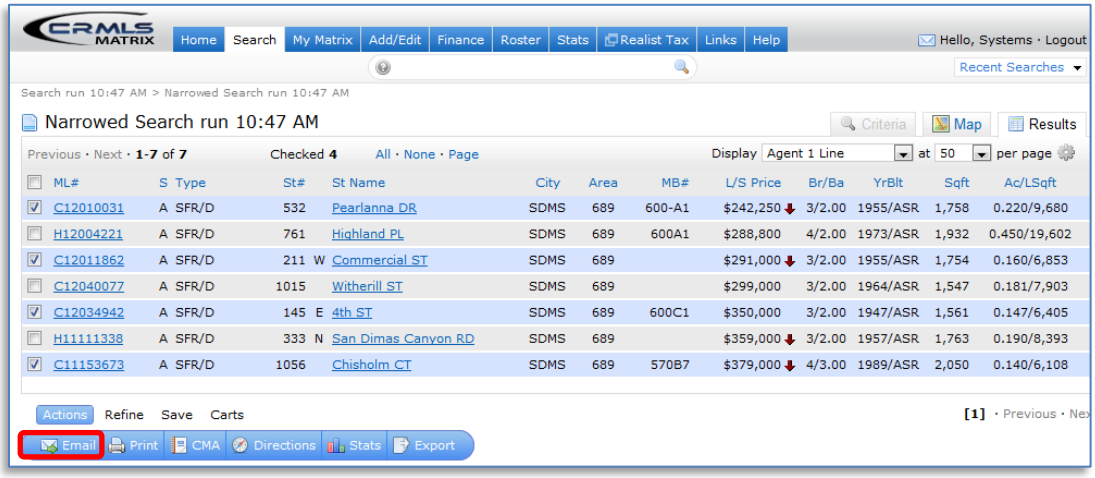
*If your email address does not appear in the **From:** field, you will need to add your email address to your account (see the "Updating Your Contact Information" section in this manual for details).*

5. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you are sending.
6. Enter a subject for the email in the **Subject** field.
7. Enter a message for your client in the **Email Body** field.
8. Click the **English** link to spell check the message you typed in the Email Body field.
9. Click the **Send** button to email the selected report to your client in PDF format.

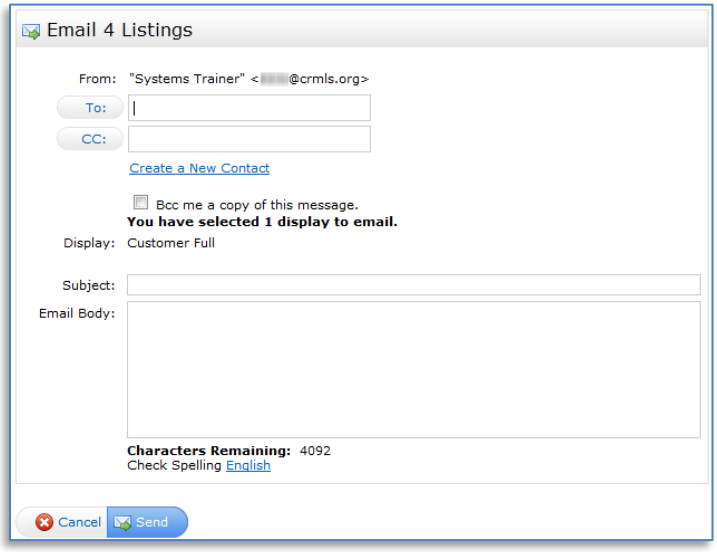
EMAILING LISTINGS AS LINKS

Follow the steps below to email listings as links. Before you begin, make sure that you've performed a search as described in the "Searching for Listings" section of this manual.

1. Click the check box next to each listing you want to include in the email.
2. Click the **Email** button.

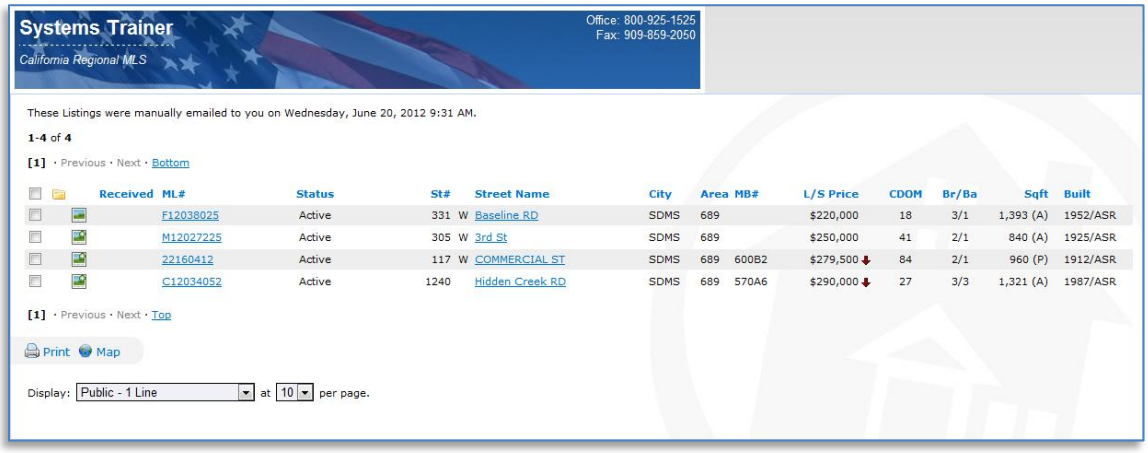

Home
Search
My Matrix
Add/Edit
Finance
Roster
Stats
Realist Tax
Links
Help
Hello, Systems · Logout
Recent Searches
Search run 10:47 AM > Narrowed Search run 10:47 AM
Narrowed Search run 10:47 AM
Criteria
Map
Results
Previous · Next · 1-7 of 7
Checked 4
All · None · Page
Display Agent 1 Line at 50 per page
ML# S Type St# St Name City Area MB# L/S Price Br/Ba YrBlt Sqft Ac/LSqft
C12010031 A SFR/D 532 Pearlanna DR SDMS 689 600-A1 $242,250 3/2.00 1955/ASR 1,758 0.220/9,680
H12004221 A SFR/D 761 Highland PL SDMS 689 600A1 $288,800 4/2.00 1973/ASR 1,932 0.450/19,602
C12011862 A SFR/D 211 W Commercial ST SDMS 689 $291,000 3/2.00 1955/ASR 1,754 0.160/6,853
C12040077 A SFR/D 1015 Witherill ST SDMS 689 $299,000 3/2.00 1964/ASR 1,547 0.181/7,903
C12034942 A SFR/D 145 E 4th ST SDMS 689 600C1 $350,000 3/2.00 1947/ASR 1,561 0.147/6,405
H11111338 A SFR/D 333 N San Dimas Canyon RD SDMS 689 $359,000 3/2.00 1957/ASR 1,763 0.190/8,393
C11153673 A SFR/D 1056 Chisholm CT SDMS 689 570B7 $379,000 4/3.00 1989/ASR 2,050 0.140/6,108
Actions
Refine
Save
Carts
[1] · Previous · Ne
Email
Print
CMA
Directions
Stats
Export

3. Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's email address in the **To:** field. Separate multiple recipients by typing a semi-colon (;) after each email address.



Note: *To select more than one contact in your contact list, hold down the* ***CTRL*** *key on your keyboard as you select them.*

4. Click the "**Bcc me a copy of this message**" checkbox to receive a copy of the email you're sending.
5. Enter a subject for the email in the **Subject** field.
6. Enter a message for your client in the **Email Body** field.
7. Click the **English** link to spell check the message you typed in the email body field.
8. Click the **Preview** button to preview how the properties will appear to your recipient once they click on the link contained in their email.

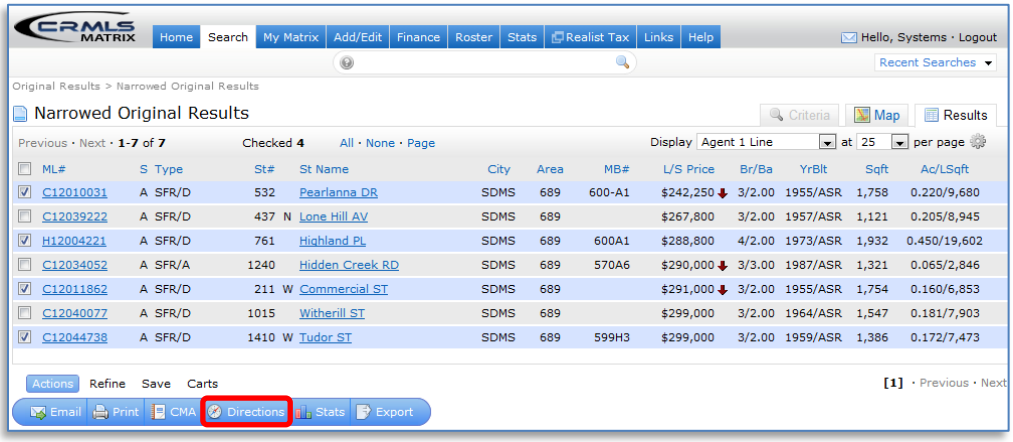

Systems Trainer
California Regional MLS
Office: 800-925-1525
Fax: 909-859-2050
These Listings were manually emailed to you on Wednesday, June 20, 2012 9:31 AM.
1-4 of 4
[1] · Previous · Next · Bottom
Received ML# Status St# Street Name City Area MB# L/S Price CDOM Br/Ba Sqft Built
F12038025 Active 331 W Baseline RD SDMS 689 $220,000 18 3/1 1,393 (A) 1952/ASR
M12027225 Active 305 W 3rd St SDMS 689 $250,000 41 2/1 840 (A) 1925/ASR
22160412 Active 117 W COMMERCIAL ST SDMS 689 600B2 $279,500 84 2/1 960 (P) 1912/ASR
C12034052 Active 1240 Hidden Creek RD SDMS 689 570A6 $290,000 27 3/3 1,321 (A) 1987/ASR
[1] · Previous · Next · Top
Print Map
Display: Public - 1 Line at 10 per page.

9. Click the **Send** button to email the selected listings as links to your client.

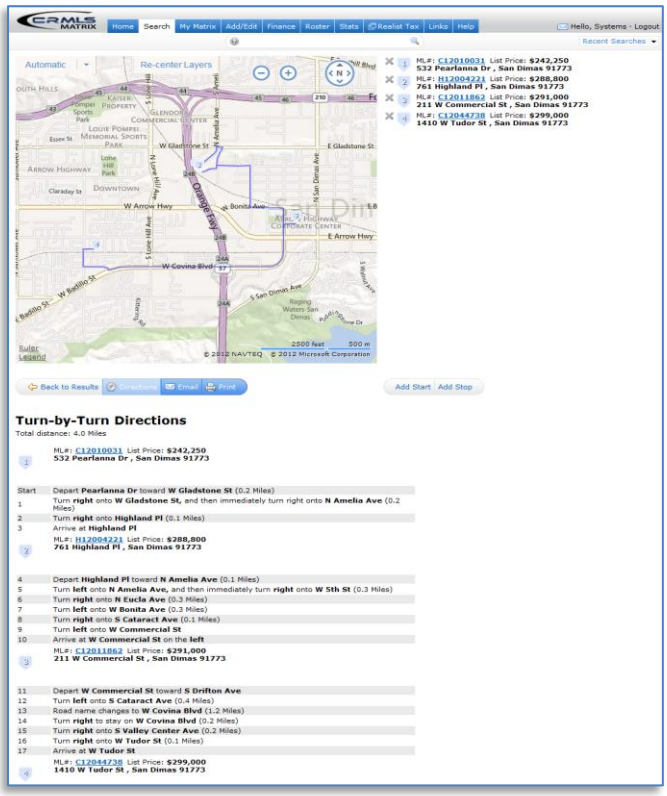
DRIVING DIRECTIONS

Follow the steps below to get driving directions for listings. Before you begin, make sure that you've performed a search as described in the "Searching for Listings" section of this manual.

1. Click the check box next to each listing you want to display on a map.
2. Click the **Directions** button.

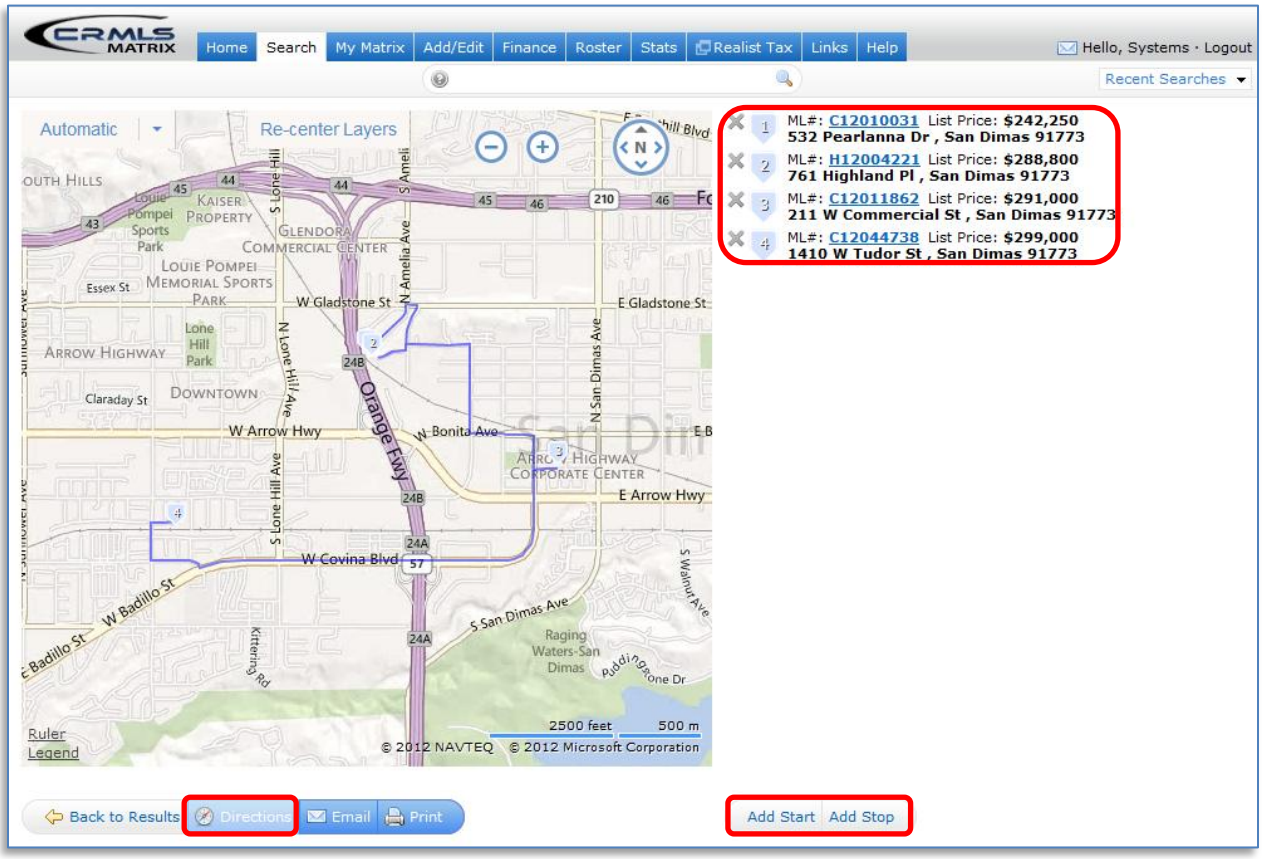

Home
Search
My Matrix
Add/Edit
Finance
Roster
Stats
Realist Tax
Links
Help
Hello, Systems · Logout
Recent Searches
Original Results > Narrowed Original Results
Narrowed Original Results
Criteria
Map
Results
Previous · Next · 1-7 of 7
Checked 4
All · None · Page
Display Agent 1 Line at 25 per page
ML# S Type St# St Name City Area MB# L/S Price Br/Ba YrBlt Sqft Ac/LSqft
C12010031 A SFR/D 532 Pearlanna DR SDMS 689 600-A1 $242,250 3/2.00 1955/ASR 1,758 0.220/9,680
C12039222 A SFR/D 437 N Lone Hill AV SDMS 689 $267,800 3/2.00 1957/ASR 1,121 0.205/8,945
H12004221 A SFR/D 761 Highland PL SDMS 689 600A1 $288,800 4/2.00 1973/ASR 1,932 0.450/19,602
C12034052 A SFR/A 1240 Hidden Creek RD SDMS 689 570A6 $290,000 3/3.00 1987/ASR 1,321 0.065/2,846
C12011862 A SFR/D 211 W Commercial ST SDMS 689 $291,000 3/2.00 1955/ASR 1,754 0.160/6,853
C12040077 A SFR/D 1015 Witherill ST SDMS 689 $299,000 3/2.00 1964/ASR 1,547 0.181/7,903
C12044738 A SFR/D 1410 W Tudor ST SDMS 689 599H3 $299,000 3/2.00 1959/ASR 1,386 0.172/7,473
Actions
Refine
Save
Carts
[1] · Previous · Next
Email
Print
CMA
Directions
Stats
Export

You will see a map similar to this one with the selected listings.



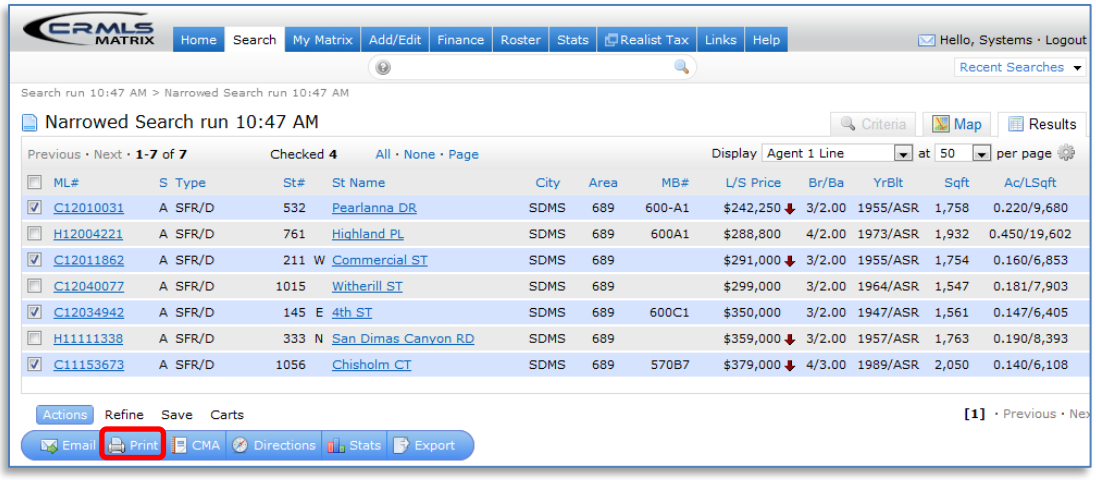
3. From the driving directions screen, you can do the following:
    a. Click **Add Start** or **Add Stop** to add a starting or stopping location.
    b. Click and drag a listing above or below another listing to change the order.
    c. Click the **X** next to a listing to remove it from the list.

    When you're done adding starting and stopping locations, changing the order of the listings, or removing listings, click the **Directions** button again to update the driving directions.



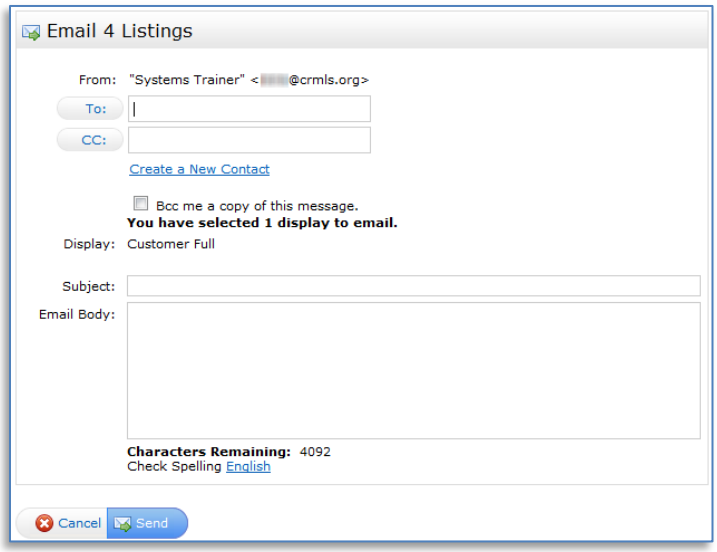
Follow the steps below to email listings as a PDF report. Before you begin, make sure that you've performed a search as described in the "Searching for Listings" section of this manual.

1. Click the check box next to each listing you want to include in the email.
2. Click the **Print** button.



3. Select any of the customer displays (from the Primary Report tab) or listing reports (from the Additional Reports tab) you want to email and then click the **Email PDF** button.

4. Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's email address in the **To:** field. Separate multiple recipients by putting a semi-colon (;) after each entry.



Note: *To select more than one contact in your contact list, hold down the **CTRL** key on your keyboard as you select them.*

*If your email address does not appear in the **From:** field, you will need to add your email address to your account (see the "Updating Your Contact Information" section in this manual for details).*

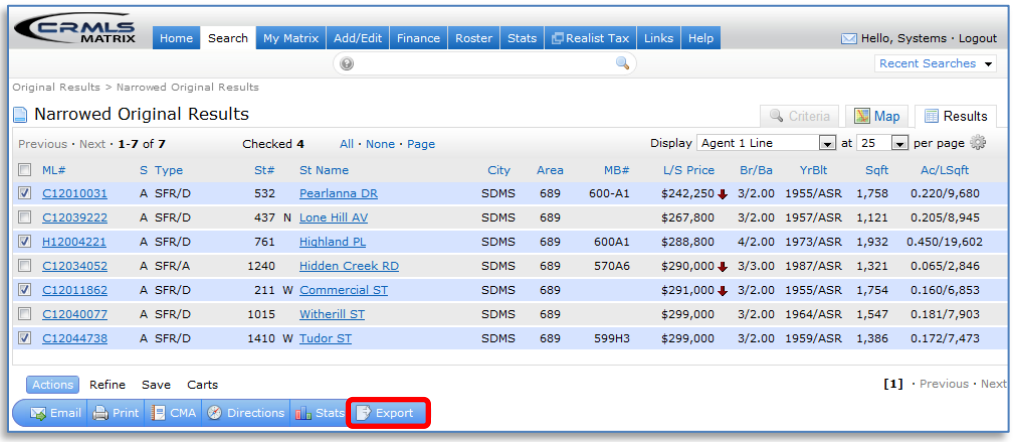
5. Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you are sending.
6. Enter a subject for the email in the **Subject** field.
7. Enter a message for your client in the **Email Body** field.
8. Click the **English** link to spell check the message you typed in the Email Body field.
9. Click the **Send** button to email the selected report to your client in PDF format.

EXPORTING SEARCH RESULTS

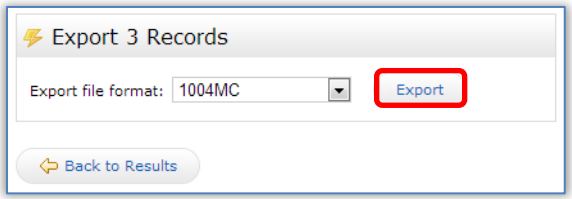
Follow the steps below to Export (download) search results in Matrix. Before you begin, make sure that you've performed a search as described in the "Searching for Listings" section of this manual.

1. Click the check box next to each listing you want to Export.
2. Click the **Export** button.

   ***Note**: You can select up to 500 listings at a time to Export.*


Home
Search
My Matrix
Add/Edit
Finance
Roster
Stats
Realist Tax
Links
Help
Hello, Systems · Logout
Recent Searches
Original Results > Narrowed Original Results
Narrowed Original Results
Criteria
Map
Results
Previous · Next · 1-7 of 7
Checked 4
All · None · Page
Display Agent 1 Line at 25 per page
ML# S Type St# St Name City Area MB# L/S Price Br/Ba YrBlt Sqft Ac/LSqft
C12010031 A SFR/D 532 Pearlanna DR SDMS 689 600-A1 $242,250 3/2.00 1955/ASR 1,758 0.220/9,680
C12039222 A SFR/D 437 N Lone Hill AV SDMS 689 $267,800 3/2.00 1957/ASR 1,121 0.205/8,945
H12004221 A SFR/D 761 Highland PL SDMS 689 600A1 $288,800 4/2.00 1973/ASR 1,932 0.450/19,602
C12034052 A SFR/A 1240 Hidden Creek RD SDMS 689 570A6 $290,000 3/3.00 1987/ASR 1,321 0.065/2,846
C12011862 A SFR/D 211 W Commercial ST SDMS 689 $291,000 3/2.00 1955/ASR 1,754 0.160/6,853
C12040077 A SFR/D 1015 Witherill ST SDMS 689 $299,000 3/2.00 1964/ASR 1,547 0.181/7,903
C12044738 A SFR/D 1410 W Tudor ST SDMS 689 599H3 $299,000 3/2.00 1959/ASR 1,386 0.172/7,473
Actions
Refine
Save
Carts
[1] · Previous · Next
Email
Print
CMA
Directions
Stats
Export

3. Choose from any of the Available Exports and click **Export**.



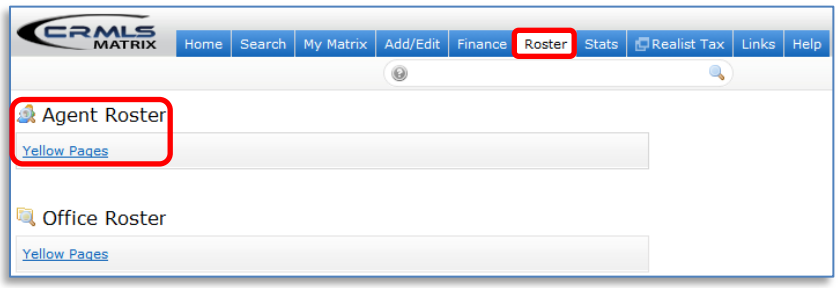
4. Follow the prompts on the screen to save the exported listings to your computer.

SEARCHING FOR AGENTS AND OFFICES

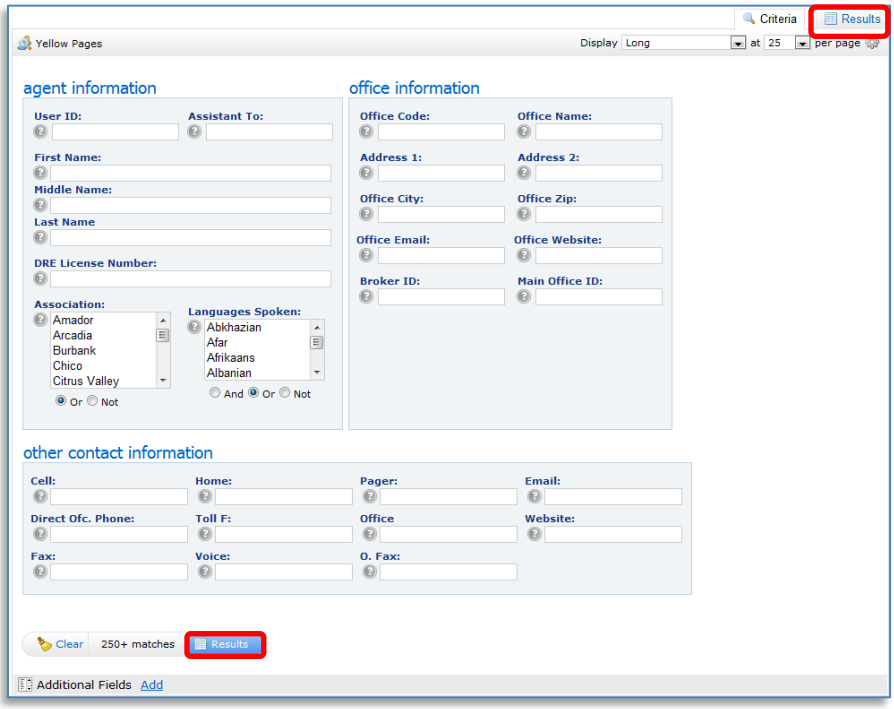
The Matrix platform's **Roster** allows you to search for Agents and Offices that are part of the CARETS database. Follow the steps in these sections to search for Agents and Offices.

SEARCHING FOR AGENTS

1. Click the **Roster** tab.
2. Click the **Yellow Pages** link under the Agent Roster section.

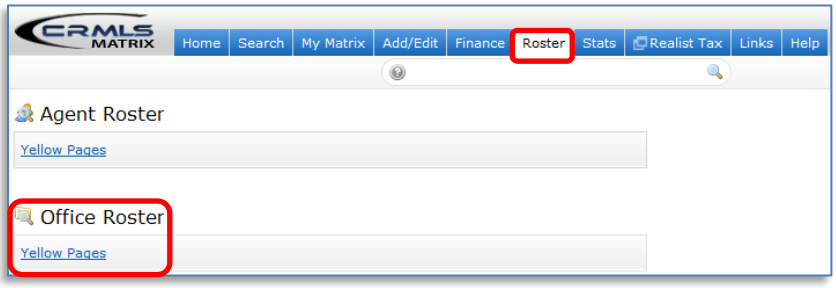


3. Enter your search criteria using the available fields.
4. Click the **Results** button or tab to display a list of agents that match your search criteria.
   Tip: *Use an asterisk (*) after a partial first or last name to search for any first or last names beginning with the letters entered before the asterisk (*).*



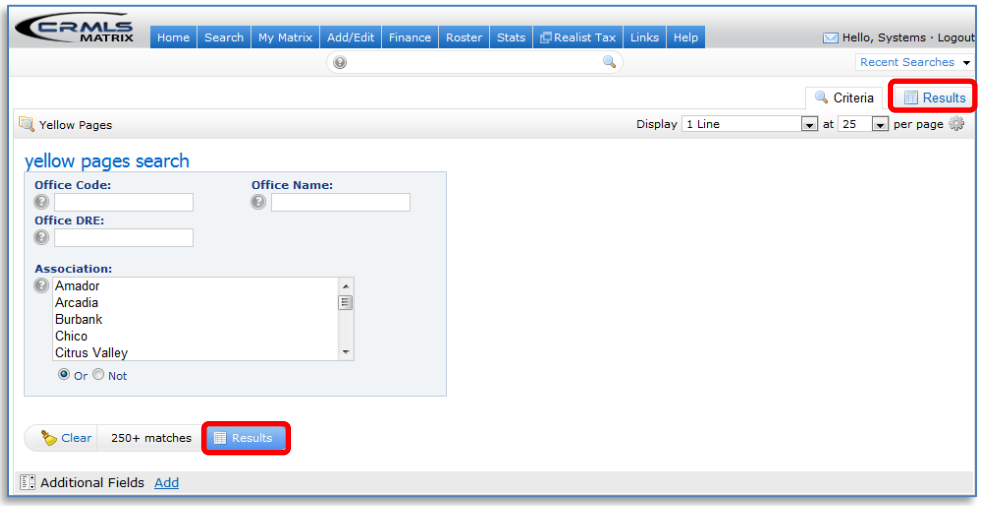
SEARCHING FOR OFFICES

1. Click the **Roster** tab.
2. Click the **Yellow Pages** link under the Offices category.



3. Enter your search criteria using the available fields.
4. Click the **Results** button or tab to display a list of agents that match your search criteria.

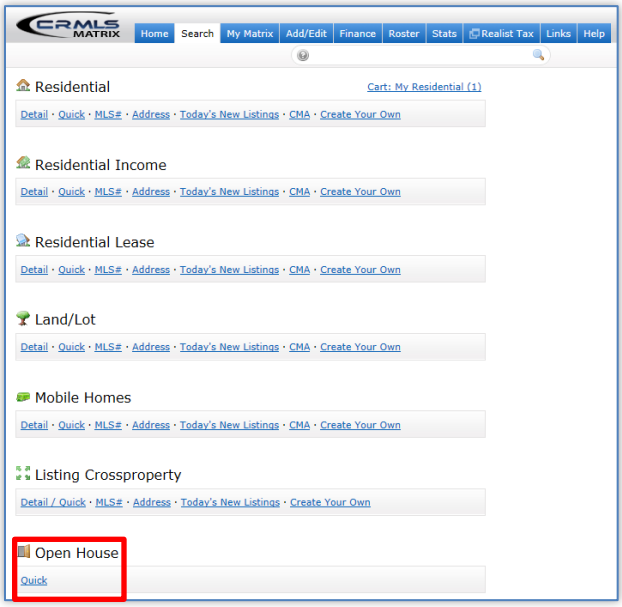
Tip: *Use an asterisk (*) after a partial office name to search for any offices beginning with the letters entered before the asterisk (*).*



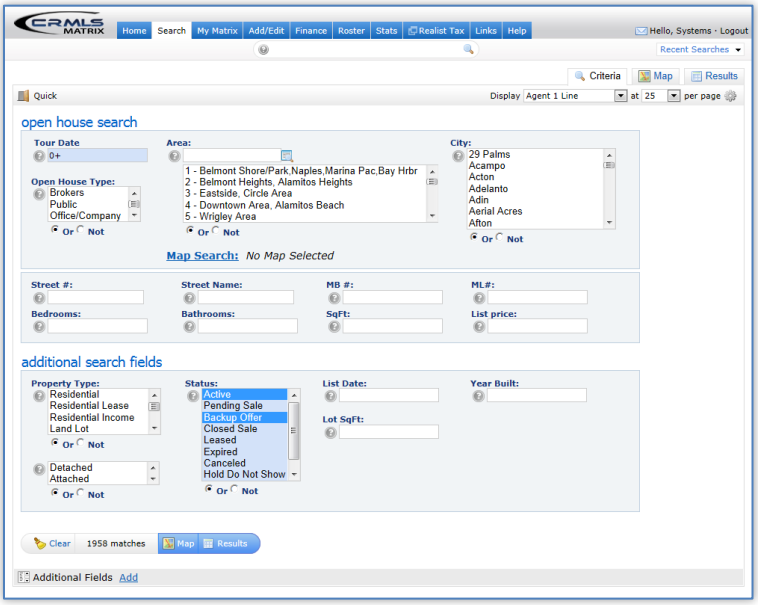
SEARCHING FOR OPEN HOUSES

Follow the steps below to search for Public, Broker, and Office Open Houses.

1. Click the **Search** tab, then click the Quick link under Open House.



2. Enter your search criteria. To select more than one item in a field, hold the **CTRL** key on your keyboard while clicking the desired items. To deselect an item, hold the **CTRL** key on your keyboard and click the item you want to remove.



***Note**: If you need help entering search criteria, click the* *icon next to the field you need help with. For a list of special characters allowed for search fields, refer to the additional search options on page 32 of this manual..*

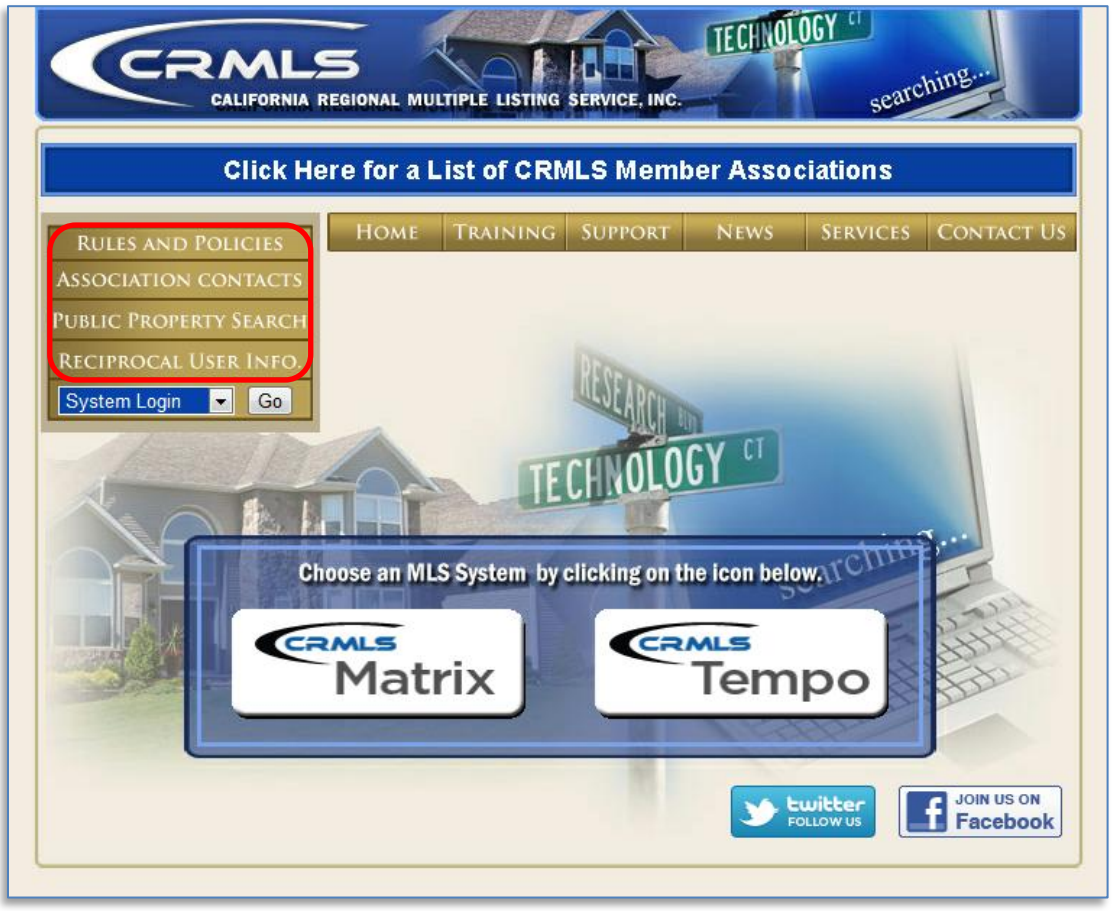
3. Click the **Results** tab to view Open Houses that match your search criteria.

CRMLS CARE RESOURCES

CRMLS WEBSITE

The CRMLS web Site located at http://www.crmls.org contains the following tools and resources.

- Rules and Policies
  - Carets Standardized Rules and Regulations
  - California Model Rules about Service Type
  - CARETS Data Integrity Standards
- Association Contacts
- Public Property Search
- Reciprocal User Information for CRMLS members and non-members



TRAINING RESOURCES

CRMLS takes pride in providing quality training materials and training resources to fit all of our member's schedules and individual learning styles. Training resources can be found by visiting http://www.crmls.org and clicking on the **TRAINING** button.

CRMLS
CALIFORNIA REGIONAL MULTIPLE LISTING SERVICE, INC.
TECHNOLOGY
searching...
Click Here for a List of CRMLS Member Associations
RULES AND POLICIES
ASSOCIATION CONTACTS
PUBLIC PROPERTY SEARCH
RECIPROCAL USER INFO.
System Login
Go
HOME
TRAINING
SUPPORT
NEWS
SERVICES
CONTACT US
TRAINING
Sign Up for Classroom Training
Classroom Training - Click to register and view all available California Regional MLS training classes held at Local Association/Board of REALTORS® offices and the California Regional MLS office in San Dimas, CA.
Sign Up for Webinar Training
Webinar (Web Conference) - Click to register and view all available California Regional MLS webinars.
Online Videos
Online Videos - Click and choose your MLS platform to view pre-recorded training videos for all available product offerings, such as Matrix, Tempo, and Realist.
Documentation
Training Documentation - Click and choose your MLS Platform to download manuals and quick reference guides for all available product offerings, such as Matrix, Tempo, and Realist.

CRMLS offers the following types of training:

- **Instructor Led Classroom Training**: Classroom style training classes held at your local association. Check the training calendar for a list of available classes.
- **Hands on Training**: Classroom style training classes held at the CRMLS offices in San Dimas. Seating for these classes is limited, so be sure to sign up early.
- **Webinar Training (Web Conference):** On-line training classes that can be taken from the comfort of your home or office (requires high speed internet access).
- **Online Videos:** Learn at your own pace with our on demand video tutorials.
- **Product Documentation:** Download PDF copies of product manuals or download replacement training materials (requires Adobe reader 7.0 or later).

CUSTOMER CARE

CRMLS takes pride in providing expert customer support to all of our members. Our Customer Care staff is prepared to assist you with any CRMLS Matrix platform questions you may have, technical issues, or trouble shooting assistance.

To contact our Customer Care department, visit our website at http://www.crmls.org and click on the **SUPPORT** button. Then, click the **Submit Support Request or Suggestions** link to submit an online support request or suggestions (we value your suggestions).

If you need immediate assistance, our Customer Care technicians are available to answer your questions Monday through Friday from 8:30 a.m. to 9:00 p.m. and on Saturday and Sunday from 10:00 a.m. to 3:00 p.m.

Toll Free Number: **(800) 925-1525**

On the web: http://www.crmls.org/support

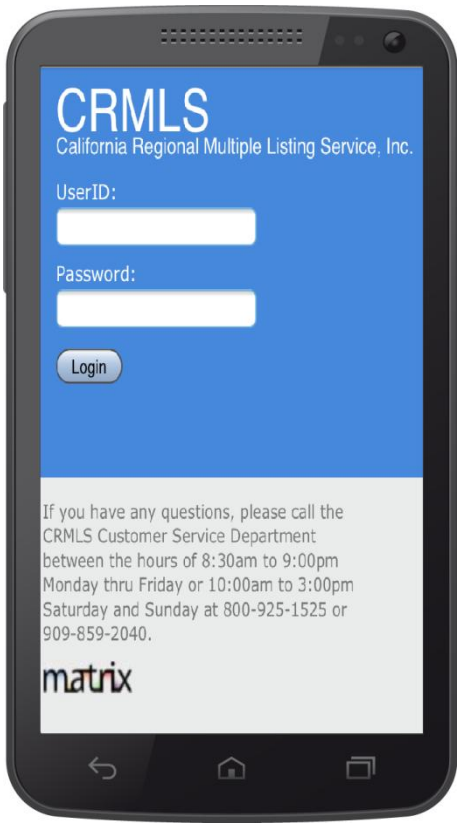
APPENDIX

SEARCHING FOR LISTINGS ON YOUR MOBILE DEVICES

CRMLS Mobile, powered by the Matrix platform, allows you to search for Listings from your mobile devices. Follow the steps below to get started.

1. Open your mobile device's web browser and navigate to http://www.crmlsmobile.com
2. Enter your User ID and Password in the fields.
3. Click the Login button and start searching for listings.

Note: Access to CRMLS Mobile is free, however, your wireless carrier may charge extra for Internet data usage on your mobile device. Please contact your wireless carrier for Internet data rates and charges.


CRMLS
California Regional Multiple Listing Service, Inc.
UserID:
Password:
Login
If you have any questions, please call the CRMLS Customer Service Department between the hours of 8:30am to 9:00pm Monday thru Friday or 10:00am to 3:00pm Saturday and Sunday at 800-925-1525 or 909-859-2040.
matrix

ADDING A PUBLIC SEARCH LINK TO YOUR WEBSITE

Follow the steps below to add a public search link to your website.

1. Open your web browser and navigate to http://www.crmls.org and click **SUPPORT.**
2. On the support page, click **Link Generator**.

3. Enter your **Public ID** and **Office Code** in the available fields.
   Note: *if you don't know your Public ID or Office code, see the "Searching for Agents and Offices" section of this manual.*
4. Select a language(s) from the list of available languages.
5. Click the **Get Links** button.

6. Highlight and then **copy and paste the text** of the generated code and email it to your website programmer in order to integrate it into your personal site.

   Note: *There are three available links for your website; a General Public Search, an Agent Listings Link, and an Office Listings link.*